

THE ASIA
VIDEO INDUSTRY REPORT



avia
ASIA VIDEO INDUSTRY ASSOCIATION



ABOUT AVIA

The Asia Video Industry Association (AVIA) is the trade association for the video industry and ecosystem in Asia Pacific. It serves to make the video industry stronger and healthier through promoting the common interests of its members. AVIA is the interlocutor for the industry with governments across the region, leads the fight against video piracy through its Coalition Against Piracy (CAP) and provides insight into the video industry through reports and conferences aimed to support a vibrant video industry.



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The Asia Video Industry Report 2025 is curated and edited by Charmaine Kwan, Head of Marketing and Communications, AVIA.

Please note that data and contributions provided by third parties have been generated independently and represents their own views. Unless stated otherwise, all amounts are expressed in USD.

AVIA IS

POLICY

THE VOICE OF THE
INDUSTRY WITH
GOVERNMENTS
AND REGULATORS

PIRACY

DEDICATED TO
FIGHTING AND
REDUCING VIDEO
PIRACY

INSIGHT

COMMITTED
TO PROVIDING
INSIGHT THROUGH
ENGAGEMENT

The Asia Video Industry Association (AVIA) exists to make the industry stronger and healthier and thus create a better business environment for its members.

THE EVOLUTION OF THE VIDEO INDUSTRY: A PERSPECTIVE AT THE END OF 2024

The video industry has undergone a remarkable transformation over the past few decades. What began as a relatively homogenous and collegial pay TV industry has evolved into a multifaceted ecosystem encompassing pay TV, streaming, free-to-air (FTA) broadcasting, and more. This diversity reflects the rapid changes in technology, consumer preferences, and business models that have shaped the industry into what it is today. Yet, amid this evolution, there remain common challenges and opportunities that bind the sector together, driving the need for collective action which sits at the heart of what we at AVIA are here to do.

A UNIFIED PAST: THE PAY TV ERA

In its early days, the pay TV industry was marked by a sense of unity and shared purpose. Industry players—whether they were operators, content providers, or distributors—were part of a relatively small, tight-knit community. Collaboration was a cornerstone of this era, with companies working together to build out infrastructure, expand consumer access, and create a vibrant content ecosystem.

The industry's priorities were clear: growing subscriber bases, negotiating carriage agreements, and delivering compelling content to audiences. Business models were straightforward, centered on subscription revenues and

partnerships with advertisers. Regulation, while still a factor, was less complex given the industry's relatively uniform structure.

THE PRESENT: A DIVERSE AND COMPLEX ECOSYSTEM

Today, the video industry is almost unrecognizable compared to its earlier days. It is now a dynamic mix of pay TV operators, direct-to-consumer (D2C) streaming platforms, FTA broadcasters, channel operators, program sales distributors, and movie studios. Each segment brings unique opportunities and challenges, reflecting the diversity of ways in which audiences consume content.

Streaming has emerged as a dominant force across Asia, reshaping consumer expectations for content accessibility and quality. At the same time, traditional pay TV and FTA operators continue to innovate, leveraging their established presence and expertise to stay relevant. Content creators and studios, too, are exploring new avenues, from licensing deals to launching their own D2C platforms.

This diversification has also fostered increased competition, not just between companies within the same segment but also across segments. For instance, a streaming platform might find itself competing with a traditional broadcaster for advertising dollars or a pay TV

operator for consumer attention. Yet, this competition is complemented by new forms of collaboration, such as co-production agreements and cross-platform distribution partnerships.

COMMON CHALLENGES IN A FRAGMENTED INDUSTRY

Despite its diversity, the video industry faces shared challenges that require collective solutions. This is where AVIA plays a pivotal role, serving as a unifying force for the industry. Some of the key areas of focus include:

1. Engaging with Regulators

As the industry evolves, so too does the regulatory landscape. Policymakers across Asia are grappling with how to apply existing frameworks to new business models and technologies. For instance, questions around content quotas, licensing requirements, and taxation for streaming platforms remain hotly debated.

AVIA plays a critical role in engaging with regulators to ensure they understand the complexities of the industry. By providing data, insights, and a platform for dialogue, AVIA helps policymakers craft regulations that enable all parts of the industry to thrive. This is particularly important in Asia, where regulatory

approaches can vary significantly from market to market.

2. Fighting Piracy

Piracy remains a significant threat to the industry, undermining legitimate businesses and robbing content creators of fair compensation. The rise of streaming has made piracy even more pervasive, with illegal services often offering content at a fraction of the cost—or even for free.

AVIA has been at the forefront of anti-piracy efforts, coordinating industry-wide initiatives to shut down illegal services, raise consumer awareness, and promote the value of legitimate content. Collaboration with governments, technology providers, and enforcement agencies has been key to these efforts.

3. Supporting Advertising in Premium Content

Advertising has long been a cornerstone of the video industry, particularly for FTA broadcasters and, more recently, ad-supported streaming platforms. However, the shift toward digital has brought new challenges, including competition from social media and short-form video platforms.

AVIA advocates for the value of advertising in premium, long-form content, emphasizing its ability to deliver high engagement and brand safety. By working with advertisers, agencies, and platforms, AVIA helps ensure that advertising remains a viable revenue stream for the industry.

4. Engaging with Local Markets

Asia's diversity is one of its greatest strengths, but it also presents unique challenges. Global trends, such as the rise of streaming, often play out differently in local markets due to variations in consumer behaviour, infrastructure, and regulation.

AVIA's work in engaging with local markets helps the industry navigate these differences. Through events, research, and partnerships, AVIA provides insights into local trends and facilitates collaboration between global and regional players. This ensures that the industry remains responsive to the needs of audiences across Asia.

A UNIFIED FUTURE: COLLABORATION AS THE KEY TO GROWTH

As the video industry continues to evolve, the need for collaboration has never been greater. The challenges of piracy, regulation, and market fragmentation cannot be solved by individual companies alone. They require coordinated action, shared resources, and a collective voice. AVIA provides the platform for this

collaboration, bringing together stakeholders from across the industry to tackle common issues and seize shared opportunities. Whether it's advocating for fair regulation, promoting the value of premium content, or supporting local markets, AVIA's work benefits all segments of the industry.

CONCLUSION

The journey from a homogenous pay TV industry to today's diverse video ecosystem is a testament to the resilience and adaptability of the sector. While the landscape has become more complex, the core challenges remain familiar. By focusing on these challenges—engaging with regulators, fighting piracy, supporting advertising, and understanding local markets—the industry can continue to grow and thrive. Through AVIA, the video industry has a powerful ally in navigating this complexity. By fostering collaboration and advocating for the sector's interests, AVIA ensures that the industry's collective voice is heard, paving the way for a vibrant and sustainable future. ■

Louis Boswell

Chief Executive Officer, AVIA



A WORD FROM CHAIR OF THE BOARD

It's been fantastic to join the team at AVIA this year as Chair of the Board. As a long-time member of AVIA through BBC Studios, I have benefited from their brilliant work in advocacy, regulatory and anti-piracy action, and their unique ability to bring the industry together around issues and events. In my role as Chair this year I have been able to appreciate their collective expertise and the results they achieve from close-up. I have been able to witness first-hand the efforts that go in to representing all of the video industry's interests and to keeping ahead of the change in the industry. I have been impressed!

AVIA continues to offer real value to its members and to the industry. A few highlights this year include: mobilising a quick response to the National Broadcast Policy second consultation in India to protect our members' interests; providing much needed advocacy for premium video operators on a proposal for formal regulation of online content in the new Content Code in Malaysia; and successfully lobbying the Indonesian telco regulator Kominfo to tackle piracy on Telegram. AVIA's continued investment in research, including updating our Self-Governance Framework for Online Content, helps inform our members' strategic decisions and supports our engagement with policy makers. This year has also seen us bringing our members together across the markets with events

like the Future of Video conference in Mumbai, Korea in View, The State of Piracy Summit in Vietnam and Japan in View.

There is so much change in the industry which makes AVIA's role as a unifying association even more important. We're seeing global and local consolidation, but Asian content creation and services led in the region are stronger than ever; the cost of producing content is rising, while distribution revenues are under pressure. We are all working hard to connect with audiences in the way they want to consume content or connect with it off screen, while chasing ad revenue as an important part of the equation. BBC Studios is no different from its peers in the challenges it faces, but as a diverse business spanning all of these areas, we also have a myriad of opportunities. AVIA helps us to gain insights to the opportunities and they help us to minimize the obstacles standing in our way, like piracy, where AVIA has delivered some great results for the BBC and its members.

There is strength in the video industry coming together to protect our interests from inside Asia. Although the BBC is a global company, we don't have the resource locally for advocacy, anti-piracy action, and the in-depth research that is required to operate in Asia. Through AVIA we have access to all the skills and

experience of the AVIA board and the association's resources. As we recently heard at APOS, Asia is not following the same path as the US and Europe, it is travelling on a different trajectory. AVIA pulls us together as a region with united purpose, increasing our strength as one voice.

This is why I was delighted to take up the role of Chair for AVIA and why BBC Studios is proud to be a member. If you

are a member of AVIA, thank you for your support, and if you are not, then do consider joining us in the coming year. We have been leaning into the change in the industry and listening to your feedback, so we can continue to evolve and remain relevant. Please continue to be active in the association, join in the conversation and enjoy the benefits of being one of the most impactful video industry associations in the world. ■



by Phil Hardman

Chairman of the Board of Directors, AVIA
EVP & GM, BBC Studios Asia

BBC STUDIOS is the BBC's global content company. Able to take an idea seamlessly from thought to screen and beyond, the business is built on two operating areas: the global Content Studio, which produces, invests and distributes content globally, and Channels & Streaming, with BBC branded channels, services, digital news platform BBC.com and joint ventures in the UK and internationally.



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POLICY IN ASIA

As we reflect on the state of the industry for this book, we stand in amazement over the range and breadth of policy issues we've been involved in. 2024 has been a year characterised by potentially significant regulatory shifts throughout the Asia-Pacific region. This has been primarily driven by the large number of elections held in various markets, which, in some cases, has led to the appointment of new regulators. AVIA has continued to engage with both old and new regulators, often on familiar topics. And, as our in-person in-view events are back in full swing throughout the year, thankfully, we have had the ability to engage with many regulators from a wide range of markets, providing us with the crucial opportunity to create conversations, especially about the self-regulation of the Online Curated Content (OCC) industry, and seize opportunities to raise pay TV regulations in all markets that we cover. Hearing from these regulators, both in public and private, has provided us with the opportunity to better understand the rationale behind some of their policy perspectives as well as reiterate our viewpoints that help support the growth of the creative economy.

Events remain a core element of our ability to both better understand in-market issues but also publicly explore some of those key issues. Starting the year in Mumbai, we were

honoured to have both the Ministry of Information and Broadcasting (MIB) and the Telecommunications and Regulatory Authority (TRAI) on the same panel at a critical time for the Indian content industry when discussions were in full flow around a new National Broadcasting Policy. This event was followed by Korea in View, and subsequently, Japan, with Vietnam in the middle. All of these gave us the opportunity to build relationships with regulators with whom we've not had much face-to-face time with since Covid-19. At the same time, the AVIA policy team engaged with other events, most notably, those held by the International Institute of Communications, taking the opportunity to reach a new audience whilst raising familiar topics.

As policy concerns in the region continue to evolve, there has been a noticeable emphasis this year on online content and safety, the convergence and harmonisation of digital media with traditional broadcasting, and data handling rules throughout the region. Various consultations over the past 12 months have highlighted that consumer safety is of increasing paramount importance to governments. The rationale for such a focus encompasses not only the protection of consumers from exposure to harmful content, particularly the existential threat of online content that undermines the social fabric and

overall national security, but also the desire to mitigate negative influences on the personal health and life choices of their citizens.

INDIA

Nowhere are the challenges of a creative economy more starkly seen than in India, a dynamic market characterised by a robust framework for policy formulation. This year, we have actively engaged with local associations and stakeholders to advocate against regulations that may not have sufficiently considered the implications for the content industry. Notably, the draft National Broadcasting Policy, which was introduced at the end of 2023, aimed to centralise and harmonise media regulation. In response, AVIA suggested that any such National Policy should not only aim to provide a framework for promoting and regulating the national broadcasting industries but also noted that convergence, with regard to networks or services, should not be assumed simply because service providers are able to bundle services together whilst the services themselves, remain distinct. In parallel, the Broadcasting Services (Regulation) Bill was introduced with the goal of converging concerns in the broadcasting industry, such as content regulation practices and a unified licensing framework. Again, AVIA noted that different parts of the content

industry required different approaches. After endeavouring to also wrap the Bill around social media, which brought more challenges, the Bill has been temporarily paused to enable further consultations on the best way forward.

Additionally, a few unforeseen developments were sprung onto the industry throughout the year, which required timely intervention on our part. The first few concerned Supreme Court interventions – one of which mandated the requirement for a self-declaration certificate for advertisements on both print and digital platforms, which were introduced with little lead-in time. Although initially wide-ranging in scope, it was subsequently limited only to ads involving the food and health sectors. Also of concern was a Public Interest Litigation (PIL), which sought to establish a central body to regulate content on Over-The-Top (OTT) platforms. Although dismissed, it does reflect the ongoing tension in the creative economy.

Another draft that was revisited in 2024 was that of the Cigarettes and Other Tobacco Products Act (COTPA). The initial COTPA enacted last year already had stringent measures to include tobacco disclaimers and warnings on streaming platforms, but the draft of the rules released this year detailed technologically challenging measures

on streaming platforms and attempted to include a disclaimer and warning at every possible juncture. Although sympathetic to the desire to address smoking, AVIA, in collaboration with other local associations, continues to push back against measures which could potentially be so detrimental to the consumer experience and ineffective in terms of advancing the health agenda.

INDONESIA

Elsewhere, Indonesia’s regulatory environment also experienced potential regulatory churn stemming from newly elected leadership. Prior to the accession of the new President, the Ministry of Health issued a wide-ranging regulation which, amongst other things, aimed to prohibit tobacco advertising. This initially appeared to have significant implications for the display of any form of tobacco use in the media, including on online content platforms. However, after subsequent engagement and discussions led by the local associations, it became clear that the intent was really aimed solely at advertising, not all forms of content. We await the implementing legislation language to be issued to clarify this, so as to ensure that only advertisements and advertisers will be accountable rather than OCC providers.

Also in Indonesia, discussions have been ongoing on potentially revising the Broadcast Law, with one draft of the proposed revisions being released to the press earlier in May. These revisions could potentially extend KPI

authority to regulate the OCC industry, whereas currently, they regulate only the broadcasting industry. However, having issued the proposed revision without wider Ministerial consultation, we understand that further drafts of the Broadcast Law are likely to be postponed until 2025.

THAILAND

Another market that has experienced a transition in leadership is Thailand, which reaffirmed its commitment to enhancing soft power and stimulating the creative economy, particularly in the film sector. With film production incentives now increased from 20% to 30% along with the former chairman of the Soft Power Committee being elected as Prime Minister, there is hope that the local film industry and content production will continue to thrive and contribute to the growth of the creative economy.

Separately, AVIA seized the opportunity to consult with the Ministry of Culture regarding the consultation on the draft Film Act, particularly where it potentially overlaps with the OCC industry. Although the majority of the Act is only applicable to movies shown in the cinema, and the continued development of the movie industry, it is important that we continue to educate regulators on potential impacts on the wider creative industry, notably on OCC content. We anticipate an updated draft early in 2025 and will continue to emphasise the significance of self-regulation, without the need to obtain certification to do so, in online content

ratings as well as the enforcement of anti-piracy measures.

VIETNAM

Finally, in Vietnam, as a result of some unfortunate local gambling advertising being inserted in an international sports event (which, like elsewhere in other Asia markets, is illegal), the government has focussed its efforts on preventing subsequent occurrences. Initial discussions with the regulator proposed a total ban on any live sports which involved gambling advertisements, including those in the form of branding especially sponsorship. AVIA worked with local industry partners to navigate a temporary, compromised solution which would enable consumers to still be able to access international sports events, but we will continue to engage with the Ministry of Information and Communications (MIC), amongst others, as a more permanent regulatory solution is developed. AVIA’s Vietnam in View event also gave us the ability to hold significant dialogues, with the Authority of Broadcasting and Electronic Information (ABEI) to position Vietnam as

a burgeoning growth market, although there remain challenges for international OCC platforms to show anything other than movies, something AVIA will continue to push into 2025.

Of course, all of the above points are simply edited highlights of the various interventions and topics which have kept the policy team busy. But even amongst that, we are proud to announce that we have completed an updated regulatory exercise which captures the latest changes and trends in pay TV and OCC policies, producing comprehensive matrices exclusively available to members on our website. Additionally, there is a summarised booklet of key policies from various markets in the region, including the United States, United Kingdom, and the European Union, as well as the staple favourite, a massive wall chart which compares various markets in the region. The policy team looks forward to what 2025 might bring and continues to promote measures which support the ongoing growth and development of the creative economy. ■



by Clare Bloomfield
Chief Policy Officer, AVIA

CONTENT IN INDIA CHALLENGES & OPPORTUNITIES IN INDIA'S EVOLVING REGULATORY LANDSCAPE

The Media and Entertainment (M&E) sector in India grew over 8% in 2023 to cross INR 2.3 trillion and is projected to grow 10.2% to reach INR 2.55 trillion in 2024 and INR 3.08 trillion in 2026. Traditional media (television, print, filmed entertainment etc) accounts for 57% of the revenues and new media (digital and online gaming) increased its contribution to 38% in 2023.

Given the rapid growth in the sector, the Government has undertaken a slew of regulatory changes with a view to accommodate for emerging technologies, protect consumer rights, create employment opportunities, and attract domestic and foreign investment across the sector. Illustratively, films are now mandatorily required to include one accessibility feature each for the hearing and visually impaired to increase accessibility of content. The National Commission for Protection of Child Rights has issued guidelines for the engagement of children and adolescents for audio visual content which inter-alia require for producers of content to seek permission from the relevant District Magistrate. The Ministry of Information and Broadcasting (MIB) has mandated advertisers in the food and health sector to file annual self-declarations with the Government, which must also be submitted to the concerned stakeholders who will carry the advertisement.

The Ministry of Health and Family Welfare has also proposed an amendment to the guidelines regulating advertisements of cigarettes, requiring for all films released after September 2023 and all content published on OTT platforms to include anti-tobacco health spots and warnings. The Government has further expressed its intent to issue guidelines to curb instances of surrogate advertising by alcohol manufacturers.

Further, the Government is currently in the process of introducing a consolidated legislation for the entire Broadcasting sector, including OTT content and digital news, with a view to streamline regulatory processes and to introduce contemporary definitions and regulations for emerging content including regulations for advertising. The Digital Personal Data Protection Act, 2023, India's premier dedicated data protection legislation which will regulate the collection and processing of personal data once enforced has also been published. Media reports further indicate the introduction of legislation to regulate competition in the digital media sector, and a revamp of the existing regulations for information technology.

The MIB is also formulating a National Broadcast Policy to lay down long term policy with a focus on fair competition, consumer protection and content

integrity, which will further ensure that the interests of all stakeholders in the M&E sector are secured. To capitalize on the ever-growing Indian M&E sector, it becomes pivotal for all stakeholders to reevaluate their internal and external processes to ensure compliance at Indian Law. Given the sheer volume and complexity of regulations/ proposed regulations, it would be prudent for stakeholders to engage consultants in India (legal, secretarial, taxation etc.) to ensure that they stay updated on regulations to avoid liability and avail prescribed benefits. Further, such consultants may also shed light on any prevailing socio-political context that

may impede the exploitation of any audio-visual content in India.

The growth of the Indian content market has consistently outpaced most other markets in the world. Despite the current and imminent compliance requirements, stakeholders who are willing to invest the time and resources to navigate the Indian regulatory landscape will inevitably benefit from the significant increase in content consumption which is directly attributable to increased internet penetration and increased disposable income, which will only further improve in India. ■



by **Kaushik Moitra**
Partner, Bharucha & Partners

BHARUCHA & PARTNERS was founded on immutable principles of professional ethics and excellence. The Firm has offices in 3 cities with 12 partners and over 80 lawyers who offer a mix of rich experience, creativity, and the energy of youth. B&P is a full-service law firm and advises clients on domestic and cross-border issues across sectors and geographies.

PIRACY IS THEFT

CAP 2024 LIVING IN INTERESTING TIMES

In March 1936 the Member of Parliament Sir Austen Chamberlain addressed the annual meeting of the Birmingham Unionist Association. Referencing the uncertain times they were living in, Sir Austen told the meeting of a Chinese curse he had been told of from a colleague who spent time in China which took the form of saying “May you live in interesting times”.

According to the curse, living in such times was not a good thing, and as the older brother of Neville Chamberlain who became Prime Minister the next year, Sir Austen had good cause to worry about the age they were living in. Thirty years later in 1966 Bobby Kennedy, father of RFK Jr who had just been announced as the US Secretary of Health & Human Services, also referred to the Chinese curse “May he live in interesting times”, and indicated that like it or not, they were then living in dangerous times. In 1966 they certainly were. However, despite extensive research, no one has been able to locate the original curse. It appears to have simply been made up. A clever report would weave these strands into an articulate argument for anti-piracy and the work CAP does. This is not that report.

ENFORCEMENT & DISRUPTION

In identifying where and how consumers around the region are accessing pirate content, CAP's annual Consumer Surveys

underpin so much of our strategy for each year. CAP's 2024 Consumer Surveys showed that not only are most consumers accessing pirate content via social media and messaging platforms, but the incidence of piracy via these platforms has increased dramatically across the board, up from 35% in 2023 to 49% in 2024.

In light of this, a core CAP focus in 2024 was in working with the platforms to address piracy. Our work with Google is the most long-standing and in 2024 we were able to add another success via the ability to refer pirate sites to Google for them to remove ads from, which CAP is now undertaking on a monthly basis. We also referred our first lists of blocked sites in Singapore to Google for delisting in late 2023 and received confirmation from Google that they had delisted those eligible; this has now become a regular part of our enforcement program. By the end of 2024 our TCRP program had seen the removal of more than 100,000 infringing links from Google Search, and two rounds of concentrated referrals against the Yalla group of pirate sites via TCRP.

We also continued to refer blocked sites to Facebook for removal from their various platforms, as well as sending them lists of keywords associated with live sporting events for monitoring and removal. In addition to our ongoing



interaction with Google and Facebook, for the first time in 2024 CAP initiated similar efforts with TikTok. The relationship with TikTok is promising, and we are discussing the possibility of an MOU with them. CAP continued to work on blocking applications in our three main markets for such actions – Singapore, Indonesia and Malaysia, aiming to increase our efficacy in each. For Singapore, we obtained a court order early in the year to block 26 pirate sites with more than 100 associated domains. As so many of the targeted sites are sports sites, in 2024 CAP worked to obtain an order that would be in place earlier in the season and we initiated the evidence gathering process for our next order before the 2024/25 seasons started and we are on track to have the next order issued much earlier than previous orders. CAP also greatly increased the regularity of its blocks in Malaysia, moving to monthly blocks of between 20 and 50 sites a month for a total of more than 300 sites referred by the end of November. Through many years of working closely with the Ministry of Domestic Trade and Cost of Living (MDTCL) we have also seen a marked increase in the speed in which sites are blocked, with sites referred by the MDTCL to the regulator, the Malaysian Communications & Multimedia Commission (MCMC) for blocking within four days of application.

In Indonesia CAP worked closely with the local coalition AVISI on filing sites for blocking, most of which now are IP address only and by the end of October we had referred more than 800 IP address only sites to be blocked by the regulator, Kominfo, based on illegal content on the sites such as gambling. An ongoing concern in 2024 was the referral of pirate sites that cannot be blocked by Kominfo and therefore must be referred first to the Intellectual Property Office (IPO), who are woefully slow and inefficient in processing blocking referrals. To address this concern CAP organised a Workshop in September in Jakarta. The Workshop was attended by AVISI, the IPO and Kominfo. Further to a suggestion from Kominfo at the Workshop, CAP have successfully referred sites to Kominfo that did not contain gambling content, but were able to be blocked due to lack of registration. We will be pursuing this avenue of blocking more in 2025.

ENGAGEMENT & OUTREACH

The rise of piracy via social media and messaging platforms saw CAP's engagement and outreach efforts to these platforms to combat piracy take centre stage in 2024. We held bi-monthly calls with representatives from Google, Facebook and TikTok, and held two

Roundtables with each in Singapore in July and December. For TikTok the key issue is the current lack of any real or effective automated takedown, they claim they are working on measures to address this, but we will continue to push them to implement an automated tool that can be used by all CAP members. As with the other platforms, TikTok are happy to work with CAP on identifying key words for filtering, and potentially take action against notorious ISDs on their platform. For Google and Facebook, there were more issues of substance that we discussed and both Roundtables extended beyond their scheduled time due to the amount of discussion. CAP are following up with all platforms on the various action items for the next Roundtables in Singapore in December.

Frustratingly Telegram remained an outlier in terms of their total lack of cooperation with rights holders and their representatives, including CAP. As a result we lobbied the Indonesian telecommunications regulator, Kominfo, over a period of many months seeking their assistance to tackle piracy on Telegram. We made numerous submissions highlighting the links between pirated content, particularly live sport, and other illegal content such as gambling on the platform. In mid-May, at CAP's request, Kominfo organised a meeting with CAP, local Indonesian rights holders and Telegram in Jakarta. Kominfo said in the meeting they would take action and a week later the Minister announced fines for illegal activities on platforms, and he called out Telegram as being totally uncooperative. We met with Kominfo

again in August, following which once again the Minister publicly called them out for illegal activity on their platform. We will continue to work on this avenue.



The Kominfo Workshop and Telegram meetings in Jakarta were not the only examples of CAP bringing together rights holders, industry and government representatives to discuss content protection. In 2024 CAP also worked with Astro and the Premier League to hold an enforcement workshop in Malaysia with government representatives. We also worked with True, the Premier League and Synamedia to co-host an enforcement roundtable in Thailand with the Department of Intellectual Property at which all the relevant government bodies were represented. Further to CAP's Enforcement Roundtable co-hosted in Bangkok with the Thai IPO, CAP are working with CAP members and the

MPA to provide the government with a proposal for regulatory site blocking procedures.

In 2024 CAP also continued to pursue the online site blocking bill in the Philippines. Early in the year, we spoke at a number of Senate hearings for the bill in the Philippines, as well as making numerous submissions. Later in the year we visited Manila to meet Senate officials to push the site blocking bill. We supplied the Legal Team of the Senator Chair of the Committee hearing the bill with further background to the bill, and worked with Globe to provide the Committee Secretary with sufficient information to enable him to, hopefully, push the Committee to issue its report so the bill can progress. CAP also worked closely with its members on a submission to Singapore's IMDA seeking improvements to the current site blocking regime.

RESEARCH & TECHNOLOGY

CAP's annual YouGov Consumer surveys are a key part of our work, they help us identify piracy trends around the region, and in each country, and inform our strategies accordingly. Our 2024 surveys showed that was a significant increase in respondents stating that they have accessed pirated content in general (from 52% to 59%). As noted above, there was also a sharp increase in consumers accessing pirated content via social media/messaging platforms this year (from 35% to 49%), and this form of accessing piracy has overtaken International paid online video platforms as the second most popular channel to

watch content. The surveys showed that Facebook is leading the way as the most popular platform for consumers to both search for and access pirate content. To mark the release of the Surveys CAP issued a [regional press release](#), and we also worked with our local partners to issue localised releases. The Surveys were also invaluable in our presentations to governments around the region.

Thailand is a priority country for CAP and in Q2, as part of our preparation for Thai Enforcement Roundtable, CAP worked with Synamedia on an Illicit Streaming Report for Thailand. The Report looked at such piracy on social media, the open web, and pirate IPTV in Thailand from both a behavioural and technical analysis. In compiling the report we drew on multiple sources, including CAP's YouGov Consumer Surveys and our MagiCAP portal. Facebook is clearly a real concern in Thailand and the Report analysed piracy via this means, and reviewed the main pirate streaming sites and IPTV services. The Report provided three recommendations to combat streaming piracy in Thailand: implementation of an efficient and effective site blocking regime; targeting pirate revenue streams, and; working collectively with platforms to tackle piracy.

In Q3 CAP continued its program of tracking ads on the top 300 pirate sites in the region and providing them to Google for action. We expect this data will become increasingly valuable as we work with governments and intermediaries in APAC to highlight the illegal revenues generated by pirate sites. In Q4 CAP also

issued a report into the infrastructure risks in Taiwan as a result of consumers using pirate services, in particular ISDs. CAP aim to have this research released in Q4.

COLLABORATION

Collaboration with key stakeholders, particularly local coalitions, remained a key focus of CAP's activities in 2024. This began in February when we worked closely with AVISI in Indonesia to ensure a quality anti-piracy panel that CAP moderate at the Sportel event in Bali, and we continued our work with AVISI in attending the AVISI 2024 Indonesian Video Streaming Conference in March.

The passage of the Online Site Blocking bill in the Philippines is a high priority event for CAP in 2024 worked closely with the Video Coalition of the Philippines (VCP) to ensure the bill's successful passage.

As initiated last year, rather than being held with the Asia Video Summit (AVS) as was traditional, CAP's State of Piracy (SOP) event is now held in conjunction with an

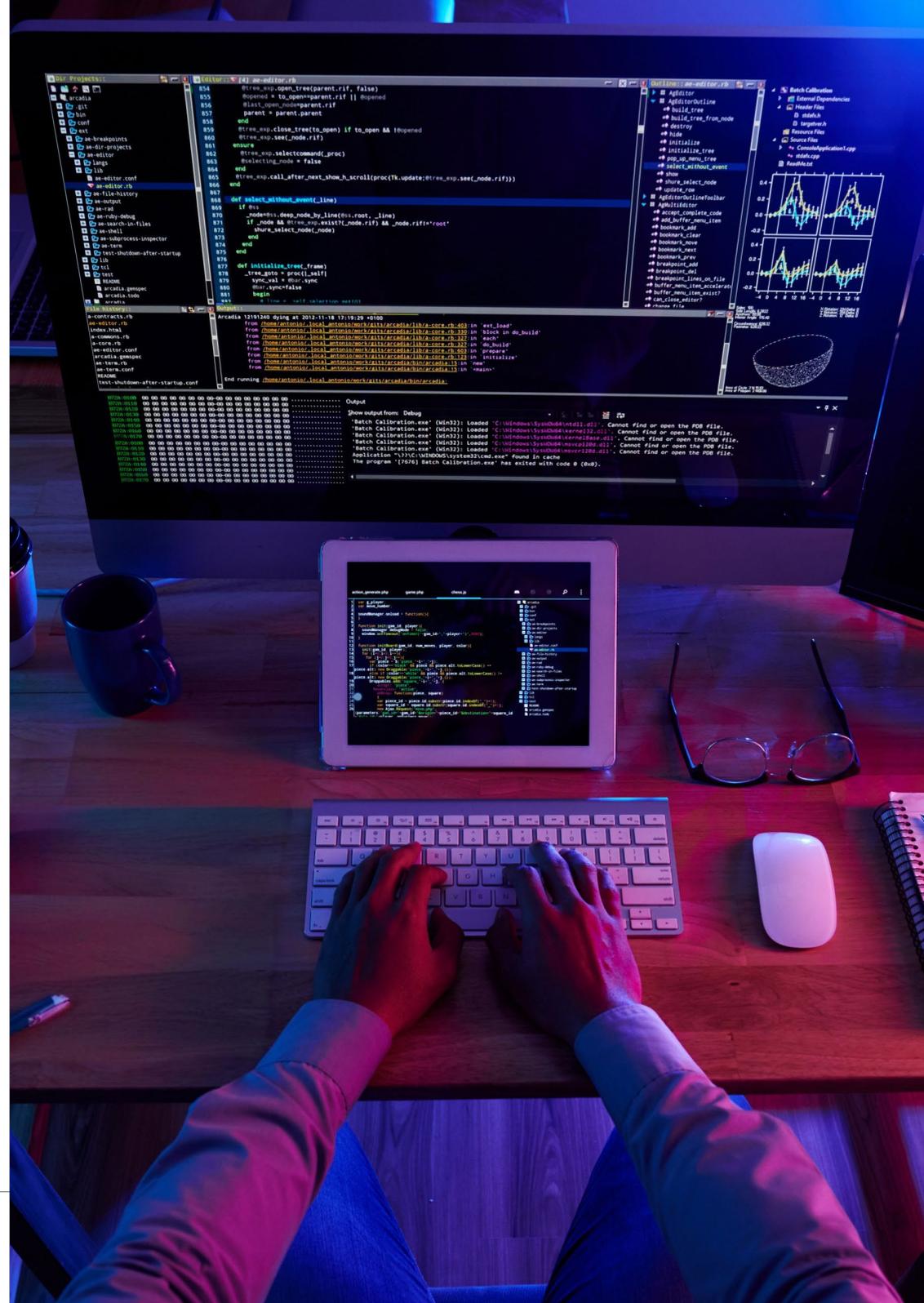
AVIA in market event, and in 2024 this was in Vietnam in October. However, AVS remains a great opportunity to amplify anti-piracy issues and concerns and in March CAP moderated an anti-piracy panel at AVS in Hong Kong. Speakers on the panel were all CAP members, and included the Premier League, TVB and our latest member, Vobile. CAP's Piracy Over the Top (POTT) event was held in Singapore in December. CAP also continued its regular program of Quarterly Reports and Meetings to ensure members remained in the loop at all times of CAP's activities and strategies.

CONCLUSION

There is no doubt we are most certainly living in interesting times, and as Bobby Kennedy continued in his 1966 speech, "They are times of danger and uncertainty; but they are also the most creative of any time in the history of mankind". It is with this in mind that CAP reviews the challenges and progress of 2024 and looks ahead to 2025. ■



by **Matthew Cheetham**
General Manager, Coalition Against Piracy

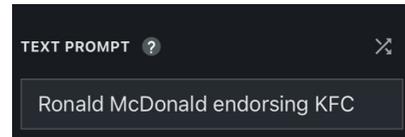


AI-GENERATED VISUAL CONTENT AND IP CHALLENGES

The creation of AI-generated visual content has profound implications for IP owners, especially in the context of copyright. When AI engines scrape images and videos to create new works, the critical question is whether such processing amounts to “reproduction” under copyright law. There also arises the vexed question of whether an AI-generated visual work is independently entitled to copyright protection. The few disputes that have so far reached courts have left many questions and concerns unaddressed. For example, in *Getty Images v Stability AI* (2023), Getty Images claimed before the UK High Court that Stability AI scraped millions of its copyrighted images to train its AI engine. While the court allowed the case to proceed to trial (finding that it involved a novel and previously undetermined question of law) it remains to be seen whether the parties decide to settle, thus scuttling the development of judicial guidelines on the subject. In *Kneschke v LAION* (2024), the Hamburg Regional Court in Germany rejected a similar claim by a stock image photographer against LAION, a non-profit AI company. Somewhat controversially, the court allowed LAION the benefit of an exemption normally reserved for research organizations. If courts begin to lean in this direction globally, copyright owners will struggle to be remunerated fairly. Given the deep links between certain non-profits and major tech companies, such an outcome might even be seen as

patently unjust. Meanwhile, in *Thaler v. Perlmutter* (2023), the US District Court in Columbia upheld the US Copyright Office’s denial of copyright in an image created using AI, ruling that “human authorship” is a necessary ingredient of copyright ownership. But the ruling arguably fails to provide guidance in situations involving human authorship assisted by AI, or the highly creative use of an AI engine where the user goes beyond dictating mundane commands.

Alongside copyright, an overlooked area involves the use of trademarks in the creation of AI-generated visual content. To illustrate, Authentix Online Brand Protection conducted an experiment where multiple AI apps were instructed to create hundreds of images using well-known trademarks in (arguably) dilutionary contexts. The results were mixed. Some engines did not use the specified trademarks, contrary to our commands. Some slightly altered the specified trademarks and then used these versions. And some used all kinds of trademarks uninhibitedly, in contexts that would probably displease trademark owners (such as Ronald McDonald advertising KFC). Depending on context and jurisdiction, such uses might be prohibited as dilution/tarnishment, or permitted under fair use/criticism/parody exceptions.



Example of an AI-created image using trademarks in an arguably dilutionary context

In the end, AI can make the process of creating high-quality visual content quicker, easier, cheaper, more accessible and more scalable. This can benefit not only novice or low-budget content creators, but also large corporations wishing to expand their reach through social media. However, IP rights owners will likely argue in favor of laws and

regulations governing the use of IP by AI engines. Rights owners may also advocate the adoption of licensing regimes (as a possible harbinger, OpenAI has [reportedly](#) been offering news organizations between USD 1 to 5 million in licensing fees to train its AI model). In both cases, copyright-related principles will probably be easier to concretize into laws and norms than trademark principles, and also receive higher prioritization. Yet, in all this, a fact that could be missed is that Western nations no longer monopolize the development of AI. AI engines that place IP owners at risk may well emanate from emerging Asian economies, with contrary viewpoints on the boundaries of IP protection. The bigger challenge for IP owners, therefore, may lie in ensuring the global acceptability of IP norms and the consent of governments and AI developers from emerging economies in the framing of such norms. ■



by **Bharat Kapoor**

Vice President, Online Brand Protection, Authentix

AUTHENTIX ONLINE BRAND PROTECTION advises over 300 of the world’s leading brands on intellectual property-related challenges in the digital world. These include monitoring for counterfeit products on online marketplaces, social media platforms and the darknet; follow-up investigations and enforcement; anti-piracy services; and litigation support. We use cutting-edge machine learning, AI and image recognition technologies that are both effective and adaptable.

Bird & Bird ATMD

ILLEGAL STREAMING DEVICES & SERVICES: ENFORCEMENT CHALLENGES IN SINGAPORE

On 24 October 2024, an individual and his two companies were convicted under section 150 of the Singapore Copyright Act 2021 (“SCA”) for selling illegal streaming devices which allowed users to unlawfully access English Premier League (EPL) football matches, as well as Disney’s and Netflix’s copyrighted content, amongst others. The conviction followed raids conducted by the police at both shops, in which 499 sets of illegal streaming devices were seized.

These are the first-ever prosecutions under section 150 SCA since the provision was introduced in late 2021. Under this provision (read with other provisions in the SCA), it is both copyright infringement and an offence to engage in commercial dealings with hardware devices, software applications or services that can facilitate unauthorised access to copyrighted content. If convicted of the offence, individuals can be fined up to S\$100,000 and be jailed for up to 5 years, while companies can be fined up to S\$200,000. In this case, the maximum fine was levied on the individual and both his companies. The individual was also sentenced to 10 months’ jail.

The decision is a significant victory in the fight against piracy in Singapore, with the sentences setting a precedent for future prosecutions under the provision.

However, one key challenge in establishing liability under section 150 SCA is the requirement to show that the target “knows or ought reasonably to know” that the device or service in question (i) is capable of facilitating access to works without the authority of the copyright owners; and, furthermore (ii) has only a limited commercially significant purpose or use other than that capability.

The provision is primarily targeted at set-top boxes that have been programmed to enable their users access to pirated content. In such case, it is relatively straightforward to establish liability under section 150 SCA. However, where the device is sold without any software applications pre-installed, it can be difficult to establish that the retailer knows that the device has a limited commercially significant purpose other than to access content from unauthorised sources.

In the Copyright Review Report issued in January 2019, when the intention to introduce section 150 SCA was first disclosed, it was suggested that this requirement could be satisfied if, for example, the set-top box was “specifically designed to access content from such sources” or “was advertised or marketed as having such functions”, or “the retailer has provided some form of assistance

to the purchaser of the set-top box to enable him to access such content”.

As such, it will be typically necessary to show that at least one of these circumstances exist before liability under section 150 SCA will be found. As such, this will have to be the focus of investigations and evidence-gathering.

Save for where the set-top box comes with a pre-installed application that

enables access to content from unauthorised sources, it will be important to ascertain the circumstances surrounding the sale of such devices – including the content of any in-store and online advertisements for the device, and whether any offer of assistance to set-up such an application in the device is made either in advertisements or at the point of sale. ■

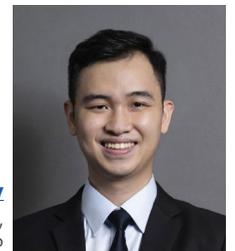
by **Pin-Ping Oh**

Partner,
Bird & Bird ATMD LLP



by **Brendan Loy**

Associate,
Bird & Bird ATMD LLP



BIRD & BIRD ATMD is a leading full-service Singapore law firm associated with the international practice of Bird & Bird. With 1,700 lawyers in 32 offices across Asia Pacific, Europe, and the Middle East, we specialise in media and entertainment, data protection, regulatory affairs, employment, compliance, brand, and online safety, and more, helping clients navigate the evolving digital landscape.

BLOCKING: THE FUSION OF LEGAL AND TECH FOR EFFECTIVE ANTI-PIRACY RESPONSE

The growth and acquisition of new audiences, as well as the retention of existing viewers, is highly dependent on the compelling and unique content that broadcasters and operators can offer. As reported at APOS this autumn, local and Asian content remains dominant and keeps rising in popularity, driven by Korean, Japanese and Chinese originals while sports IP owners are finding massive new audiences and reach online.

When left unchecked, streaming piracy fueled by the illegal acquisition of premium content is growing exponentially, diverting revenue from legitimate providers to pirate service operators. The scale of piracy is staggering, with a single Vietnam-based streaming pirate operation generating [more than 6.7 billion visits between January 2023 and June 2024 to their domains](#), an average of nearly [374 million visits per month](#). The operation was ultimately dismantled by Vietnam's Ministry of Public Security, working in close collaboration with ACE.

STRENGTHENING COLLABORATIVE EFFORTS

While traditional content security systems like Conditional Access (CAS) and Digital Rights Management (DRM) are essential, they do not wholly prevent service theft or the illicit re-streaming of the content that broadcasters and operators rely on

for competitive advantage. In order to be most effective, content security must be deployed as a comprehensive end-to-end system. By working together, broadcasters, operators, and technology providers can integrate distribution security with post-distribution anti-piracy solutions, ensuring a more cohesive and effective defence against piracy.

Broadcasters and operators who recognise the requirement to collaborate with legislators, internet service providers (ISPs), law enforcement and anti-piracy industry associations, are best positioned to tackle this issue effectively. Technologies that are closely aligned with legal or regulatory measures, such as blocking solutions, play a crucial role in ensuring an effective piracy strategy.

BLOCKING FOR SUCCESS

Blocking is one of the most effective anti-piracy enforcement measures. It works by obliging ISPs to deny consumers access to a particular site, service or infrastructure according to the terms of a court order or local regulation. Blocking methods range from static domain blocking to multiple advanced forms of dynamic blocking of delivery servers in real-time, solutions that have proven particularly effective in protecting live sports content. The blocking strategy and methodology need to be adjusted to the



local legal or regulatory frameworks and jurisdiction for the implementation of the most appropriate blocking types and methods. For example, in jurisdictions where dynamic server blocking of live content is possible, these types of blocking are often the most appropriate method, while in other territories where more advanced techniques are not currently possible, a phased approach to gradually progress from static domain to dynamic server blocking might be required to enhance existing countermeasures as regulation or legislation evolves. In some cases, a combination of different blocking methods is the most effective approach as different types of blocking can address specific approaches to pirate content distribution in different ways.

The type of blocking is not the only factor that predetermines its effectiveness. Blocking is the last stage of the anti-piracy triad of detecting, identifying and disrupting; it cuts off access to illegal services for consumers of piracy after these services have been detected and identified as such. In this sense, effective blocking relies on the scale and speed of detection and identification of multiple

different piracy vectors – websites, apps, Kodi add-ons, subscription services, etc. The level of automation of monitoring and identification of these piracy vectors underpins both the speed and efficacy of the blocking methodology, while the accuracy of piracy identification guards against blocking errors or overblocking – something that must be avoided at all costs.

Pirates often take advantage of the fragmented responses from different affected parties. To counter this [a group of broadcasters and operators in Canada came together to protect their content distribution ecosystem under the provision of the same order](#). Combining their efforts and security spend, they have implemented dynamic server blocking and, working collaboratively, have successfully tackled the issue of non-compliant hosting providers and piracy services stealing their revenues.

As with any strategy, the success of the implementation of blocking needs to be assessed through ROI calculations. While businesses guard their proprietary data on the successes of blocking, government

data casts light on the effectiveness of blocking: French regulator [ARCOM claims sports piracy in France dropped by 22%](#) as a result of blocking measures that were implemented by this organisation. Aggregated data from different businesses on the commercial effects of blocking have been reported in APAC and LATAM: [in India site-blocking led to a one-year 8% increase in lawful streaming in 2019 and in Brazil it increased lawful streaming by 5% in 2021](#).

As the results from various regions show, the impact of blocking measures is clear,

contributing significantly to the reduction of piracy and boosting legitimate content consumption. The alignment of legal frameworks and advanced technology solutions, including blocking, is essential for a comprehensive anti-piracy strategy, and so is a collaborative approach between all stakeholders. This approach enables operators and broadcasters to protect their content and revenue streams more effectively, and is key to staying ahead of increasingly sophisticated piracy operations. ■



by **Fabien Gauthier**
VP Sales, APAC, Friend MTS

FRIEND MTS is the trusted cybersecurity and anti-piracy partner to the biggest brands in media, sports, and entertainment. Our mission is to help content owners, broadcasters, and operators increase revenues by reducing piracy with our Emmy® Award-winning, data-driven solutions: content monitoring, watermarking and industry-first dynamic server & domain blocking, enforcement services.





THE TOLL OF CONTENT PIRACY ON INNOVATION & THE PHILIPPINE DIGITAL ECONOMY

In its digitalization journey, the Philippines stands at a crossroads. The nation has shown remarkable potential in harnessing the power of technology to foster inclusive growth, with its digital economy emerging as a pivotal force for economic transformation. Yet, this promise is increasingly imperiled by the scourge of content piracy, threatening to undermine the Philippines' momentum in innovation and economic growth.

The impact of piracy is both immediate and insidious. Recent data from a 2024 YouGov survey commissioned by the Asia Video Industry Association's Coalition Against Piracy (AVIA-CAP) paints a grim picture: 70% of Filipinos admitted to consuming pirated content through online streaming, a troubling increase from 58% in 2023. The Philippines now ranks second in piracy consumption across the Asia Pacific, trailing only Vietnam. This alarming trend reveals not just a blatant disregard for intellectual property rights in the country but a profound misunderstanding of the long-term economic and cultural consequences of such actions.

THE EROSION OF INNOVATION

At its core, innovation is predicated on the assurance that creative endeavors whether technological, artistic, or scientific will be protected and rewarded. This is the bedrock upon which the digital economy is built. Companies and creators alike invest

vast sums of capital, time, and intellectual energy into developing new products, technologies, and content, expecting returns on their investments. But when piracy becomes the norm, this expectation is shattered.

The creative process, inherently risky and resource-intensive, is rendered a fool's errand in an environment where intellectual property can be so easily stolen and disseminated. Filmmakers spend years crafting a cinematic masterpiece, only to see it pirated and distributed within days of release, robbing them of the fruits of their labor. A technology firm dedicates millions of funds and man hours to develop cutting-edge software, only to watch it get pirated and replicated, eroding their competitive advantage. This systemic devaluation of creative work stifles innovation, as creators and companies are disincentivized from pursuing original ideas, knowing that their efforts may yield little to no return.

THE BROADER ECONOMIC AND CULTURAL IMPACT

The implications of content piracy extend far beyond the immediate financial losses incurred by creators and companies. The creative industries, which are integral to the Philippines' cultural and economic fabric, contribute a significant portion to the nation's GDP. In 2022, the sector generated P1.6 trillion in gross

value-added, representing 7.3% of the country's GDP. However, this contribution is already in decline, slipping from 7.5% in 2018—a worrying sign that piracy is beginning to take its toll.

Yet, the damage wrought by piracy is not confined to mere economic metrics. The cultural vitality of a nation is intimately linked to its creative output. When creators are discouraged from producing original works due to the pervasive threat of piracy, the cultural landscape becomes barren. The Philippines, a nation rich in artistic talent and cultural heritage, risks losing its unique voice in the global arena, as its creative industries are slowly choked by the relentless spread of illegal content.

In addition, piracy has a chilling effect on foreign investment. Companies looking to enter the Philippine market or invest in local startups are likely to reconsider if they perceive the country as a haven for intellectual property theft. This reluctance not only stifles the inflow of capital and technology but also diminishes the Philippines' standing as a global player in the digital economy.

A CALL TO ACTION

The fight against content piracy is not merely a legal battle; it is a struggle for the soul of the nation's digital future. To stem this tide, there must be a concerted

effort to fortify intellectual property protection through legislative action and robust enforcement. The proposed amendments to the Philippines' Intellectual Property Code, particularly provisions for site-blocking, represent a crucial step in this direction. However, legislation alone will not suffice.

There must also be a cultural shift—a reawakening of the collective consciousness to the value of original work and the importance of supporting the creative minds that drive our economy forward. Public awareness campaigns, such as Globe's #PlayItRight initiative, play a vital role in this endeavor, educating consumers on the ethical and economic ramifications of piracy.

The Philippines stands on the precipice of either harnessing the full potential of its digital economy or allowing it to be undermined by the corrosive forces of piracy. The choice is clear: we must protect and nurture innovation, safeguard our cultural heritage, and ensure that the creative industries continue to thrive. Only then can we secure a prosperous and vibrant future for the nation in the digital age. ■



by **Yoly Crisanto**

Chief Sustainability & Corporate Communications Officer
Globe

GLOBE TELECOM, INC. is a leading full-service telecommunications company in the Philippines and publicly listed in the PSE with the stock symbol GLO. The company serves the telecommunications and technology needs of consumers and businesses across an entire suite of products and services including mobile, fixed, broadband, data connectivity, internet and managed services. It offers innovative digital solutions in the areas of fintech, healthtech, adtech, climate tech, shared services and venture capital. In 2019, Globe became a signatory to the United Nations Global Compact, committing to implement universal sustainability principles. Its principals are Ayala Corporation and Singtel, acknowledged industry leaders in the country and in the region.



ANTI-PIRACY AWARENESS CAMPAIGNS A KEY PART OF TACKLING PIRACY

Anti-piracy strategies have historically focused on 'hard' enforcement work - criminal prosecutions, civil lawsuits, blocking actions, knock & talks etc. These are all, of course, integral parts of an effective anti-piracy strategy. They help to reduce the supply of pirate content and send a deterrent message to pirate operators..

However, as well as reducing the supply of pirate content through enforcement work, in order to be as impactful as possible, anti-piracy strategies should integrate education and awareness elements. In other words, there should be a focus on reducing the demand for pirate content as well as its supply. Demand comes from those consuming the content, so that's where education and awareness is best focused.

There have been plenty of anti-piracy education campaigns previously, but as the industry gathers more and more insight into the nefarious nature of pirate services and their operators, having a consistent and bold education and awareness strategy becomes an increasingly important opportunity for making progress in combatting piracy. The risk of scams, malware, being caught up in wider criminal activities, having personal data sold on the dark web - there are a wealth of studies and cases that show these are all very real and commonplace risks, but that needs to be made clear to people using pirate services.

The Premier League has been running its Boot Out Piracy campaign around APAC for the last five Seasons. The campaign has very simple objectives: (1) move fans away from illegal services and towards the better quality, safer option of legitimate Premier League broadcasters, and (2) provide creatives and messaging that can be integrated into wider lobbying and communications work by the Premier League and its partners.

There are four areas the Premier League focuses on to try and achieve these:

1. MESSAGING

The messaging needs to resonate with consumers. To get that right, the campaign needs to be properly road tested and supported by data which demonstrates what concerns about piracy are likely to lead to behavioural change. For APAC, the risks of pirating have consistently been shown to be what resonates.

2. DELIVERY

There is no point having a brilliant campaign if nobody sees it, or if the people that see it are already legitimate subscribers. Digital adverts allow a campaign to be relatively precise in targeting the right audience on the right platforms. The approach the Premier League takes is to try and hit would-be pirates as they are searching for pirated content on either search engines or social media. When people click on the adverts,



they are taken to broadcaster subscription pages, thereby funnelling from pirate to legitimate content.

3. CREATIVES

Despite what we may think in the industry, anti-piracy is not a glamorous or interesting topic for most people. In order to grab the audience's attention, it's important to have creatives that stand out and are engaging. For the Premier League the obvious way to achieve that is to put our players and Clubs front and centre, working with the likes of [Garnacho](#) from Manchester United, [Alisson](#) from Liverpool and [Saka](#) from Arsenal, to name a few.

4. INTEGRATION INTO WIDER MESSAGING

Consistency and repetition is key when it comes to changing behaviour. To be effective, people need to be seeing the same messaging over and over. To help achieve this, an education and awareness

campaign that is adaptable with branding that can be used across different environments is important.

An anti-piracy awareness campaign is no silver bullet to fighting piracy, it has to sit within a varied and multi-faceted strategy. It will also likely attract some backlash. However, as piracy moves in an ever-darker direction with regard to taking advantage of fans, and as people are beginning to become more aware of the importance of safety and security online, education and awareness sits at an important crossroads in driving the legitimate consumption of content. ■



by Sean Godfrey

Head of Legal Enforcement, APAC, The Premier League

THE PREMIER LEAGUE is home to some of the most competitive and compelling football in the world. The League and its clubs use the power and popularity of the competition to inspire fans, communities and partners in the UK and across the world. The Premier League brings people together from all backgrounds. It is a competition for everyone, everywhere and is available to watch in over 1 billion homes in 189 countries.

VIDEO PIRACY ON GITHUB

GitHub, a prominent platform for open-source software development, has been used by individuals to share scripts and tools that facilitate video piracy for the past several years. This essay explores how pirates use GitHub for activities such as bypassing Digital Rights Management (DRM), generating unauthorized streaming links, and sharing decryption tools. While GitHub enforces policies to address these issues, broadcasters and operators need to work proactively with the platform to combat piracy. The essay suggests that a collaborative approach between content providers and GitHub could help minimize the misuse of the platform for illegal streaming activities.

GitHub is known for its invaluable contributions to the software development community, offering a space for collaboration and code-sharing. However, this same open platform has been co-opted by pirates for illicit purposes. As piracy continues to evolve in the digital age, GitHub has become a space for distributing scripts and tools that facilitate unauthorized access to premium video content. The platform's open-source nature allows users to easily share and access decryption keys, token generators, and direct streaming links, sometimes while attempting to evade detection by GitHub's compliance mechanisms.

CONTENT DECRYPTION MODULES (CDMs) AND DRM BYPASS

One of the primary ways by which pirates exploit GitHub involves the use of Content Decryption Modules (CDMs). CDM scripts allow users to bypass Digital Rights Management (DRM) protection and access premium video content. These scripts extract decryption keys that enable users to unlock DRM-protected content

through various applications such as "mpd4decrypt". Repositories dedicated to providing these scripts, like [CrackerCat video decryptor](#), openly offer tools for circumventing protections on streaming platforms. These resources can be integrated into external streaming panels, facilitating the decryption and distribution of otherwise restricted content.

TOKEN AND PLAYLIST-GENERATING SCRIPTS

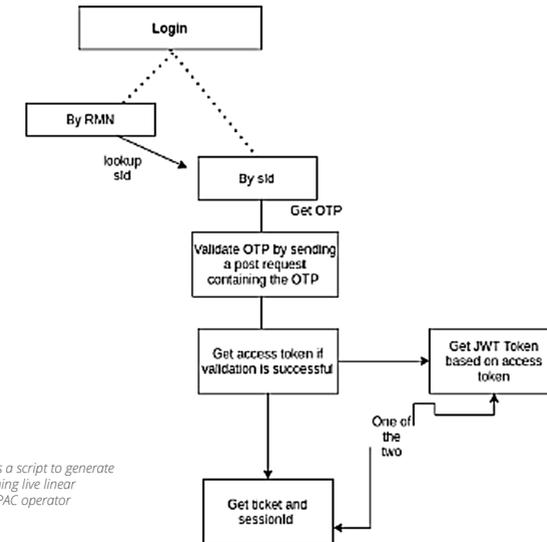
In addition to decryption modules, pirates also utilize GitHub to host token and playlist-generating scripts. These scripts emulate the way legitimate users access content by generating streaming links embedded with authorization tokens. By automating the process of obtaining fresh tokens, these tools allow users to access streams without proper authorization. Some GitHub repositories were observed providing users with token extraction scripts, while others, like [faizalrozihan](#) and [RobbiNespu/IPTV](#), offered M3U playlists containing channels, including from APAC operators.

A script to generate the m3u playlist containing direct streamable file (.mpd or MPEG-DASH or DASH) based on the channels that the user has subscribed on the [redacted] portal. You just have to login that's it

Login

The figure shows how the API authenticates any user

Using OTP



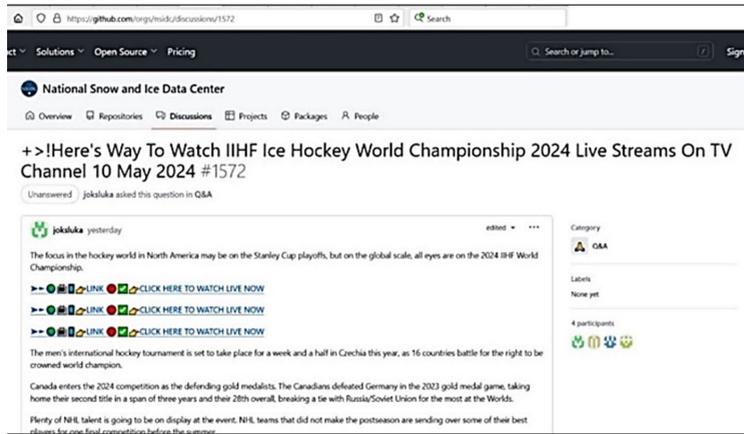
GitHub repository offers a script to generate an m3u playlist containing live linear channels of a certain APAC operator

ILLICIT STREAMING LINKS

Another method by which GitHub is abused for video piracy involves the distribution of direct streaming links. Pirates were observed using GitHub discussions and repositories to share links to pirated streams of live events, such as the IIHF Ice Hockey World Championship in May 2024. While such posts may masquerade as guides or community discussions, they often contain multiple links directing users to unauthorized streams. Although GitHub promptly removes such content when flagged, pirates continuously find ways to exploit the platform, often until DMCA takedown requests are submitted.

CIRCUMVENTING GITHUB'S POLICIES

Pirates often find ways to bypass GitHub's policies using various tactics. One common method is adding disclaimers in repositories, claiming the tools are for "educational purposes only", while they are often used for piracy. Another approach involves hosting discussions on platforms like Reddit or Telegram while keeping the actual code on GitHub. For instance, a [Reddit thread](#) about obtaining media decryption keys linked to a [GitHub repository](#) hosting the code. These strategies make enforcement challenging, but collaboration between content providers and GitHub can help mitigate these issues through proactive monitoring and DMCA takedowns.



Removed GitHub repository shared direct links to pirated streams of live sports events

CONCLUSION

GitHub's open and collaborative platform is increasingly being used for video piracy, enabling the distribution of tools and scripts that bypass DRM protections and offer unauthorized access to premium content. Despite the platform's enforcement efforts, pirates continue

to leverage its resources, often hiding behind disclaimers or using external platforms like Reddit to facilitate their activities. For broadcasters and operators, a more assertive stance in monitoring and reporting these violations is necessary to mitigate the continued spread of piracy through GitHub. ■

by **Ted Rose**

Director of
Operational Security,
Synamedia



by **Ben Levy**

Intelligence
Manager,
Synamedia



Synamedia protects approximately \$50 billion in operator revenues every year with its unrivalled intelligence-based approach, leveraging AI technologies alongside human intelligence to monitor and map the piracy supply chain. With 30 years' experience in video security, Synamedia developed the longest unhacked solution in the market, while its operational security team has brought many criminals to the attention of law enforcement officials.



ROLE OF AD TECH IN PIRACY IN SOUTHEAST ASIA

The latest data from Cybersafety technology company White Bullet shows that adtech and affiliate marketing platforms continue to play a significant role in funding high risk and illegal piracy websites in Southeast Asia

Despite efforts globally to raise awareness and engage the digital advertising industry to the risks of funding piracy, White Bullet's latest research shows high risk piracy websites in Southeast Asia continue to be supported financially by digital advertising.

WHAT KIND OF ADS?

A very significant volume of 87% of the ads found on Southeast Asian piracy publishers have visible branding, including household names both globally and regionally. This is a considerably higher percentage than in the rest of the world, which is at 63%. More branded ads - as opposed to malicious unbranded or adult ads - seem to find their way to piracy publishers in the region and questions whether brands and agencies are doing enough to implement means to filter out risky piracy publishers. Most of that advertising (86%) is gambling related and placed by marketing affiliates¹ engaged with piracy publishers who receive kick-back commissions for directing piracy user traffic to gambling websites. Where these gambling operators who receive

the traffic are legitimate and operating in regulated markets, more could be done by them to manage their networks of affiliates including stringent onboarding and regular tracking of operations and referral data audit data. Illegal gambling operators can separately be tracked, and appropriate enforcement action should be taken.

The remaining advertising found is related to a broad range of premium sectors such as travel, finance and shopping, and is mostly placed by a handful of well-known adtech companies that operate globally and regionally, see below.

The majority of the ads found on piracy websites tracked by White Bullet through 2024 in Southeast Asia were found to be delivered within the mobile ecosystem (73% of ad impressions). This compares to 38% of ad impressions in the rest of the world. Whilst it is unsurprising to see mobile ad volumes generally high given the reliance on mobile devices for Internet access in the region², proportionally it begs the question whether adtech and affiliates are less

¹ Affiliate marketing is a marketing arrangement in which affiliates receive a commission for each visit, signup or sale they generate for a merchant. This arrangement allows businesses to outsource part of the sales process.

² <https://datareportal.com/reports/digital-2024-july-global-statsshot>

Top Adtech Intermediaries by Market
(by volume of ad impressions)

Country	1 st	2 nd	3 rd
Australia	BidGear	Ads Keeper	Taboola
Hong Kong	Google	Ads Keeper	Outbrain
Indonesia	Google	A-ADS	BidGear
Malaysia	A-ADS	BidGear	Google
Philippines	BidGear	A-ADS	Google
Singapore	Taboola	BidGear	Google
Taiwan	MicroAd Inc	Google	BidGear
Thailand	Google	BidGear	A-ADS
Vietnam	Google	Mgid	A-ADS

vigilant when it comes to mobile ad placement safety checks as compared to desktop placements.

HOW CAN ADTECH GET INVOLVED TO SOLVE THE PROBLEM OF AD-FUNDED PIRACY?

Considerable numbers of ads are delivered via major adtech platforms. Surprisingly, the same eight companies compete for first, second and third place in all the regional countries tracked in terms of volumes of ad placed.

The top three advertising platforms placing the most ads on piracy websites

are Google, BidGear and A-ADS (formerly Anonymous Ads). Google placed the most ads, with 27% more ad impressions than BidGear, and almost double the number of ad impressions of A-ADS. Whilst country data varies, Google appears in the top three adtech intermediaries for all except Australia.

The fact major adtech players are involved suggests these companies need to improve their understanding and visibility of online piracy risk. Piracy is known to be a difficult area for more traditional brand safety tools, which rely heavily on keyword and audience tracking and use invalid (bot) traffic detection to identify

risky publishers. Piracy websites and apps, however, rarely feature specific keywords that relate to piracy. Instead, the language reflects that of legitimate and mainstream media streaming platforms. Equally, the nature of the content being offered without licence such as live sports, movies, music and games, attracts real human eyeballs (visitors) seeking to get free and/or early release content, which means bot traffic detection tools will (correctly) show them to have a real and legitimate audience for ad placement instead of blocking ads. The fact the content on offer is rich media and usually from big name producers and creators attracts valuable advertising that might read the files as being valuable as compared to more mundane user-generated content.

Finally, piracy publishers are known to be some of the most dynamic on the web, often redirecting or mirroring or simply changing domain to avoid enforcement, blocking and search engine delisting. The result is an environment ripe for ad placement that constantly evolves. Without specialist and dynamic tools and data feeds adtech companies run the risk of misplacement.

However, all is not lost. Programmes operating in other regions such as Europe and the US show that affiliate marketing compliance monitoring and outreach to the ad industry does make a difference and reduces both volume of ads and the value of ads going to piracy publishers. European and US programmes operated by regulators, law enforcement, trade associations and concerned brands have seen over 80% of advertisers decrease engagement with piracy publishers after receiving evidence of misplacement and cleaning up their digital ad supply chain. Equally, over 95% of advertisers in regulated sectors like gambling and finance reduced advertising on piracy websites by cleaning up their affiliate programmes.

Similar programmes are being mooted in the Southeast Asia and would likely impact piracy ad revenues in much the same way. ■



by Tom Chytil

Director of Business Intelligence and Data Integrity
White Bullet

*Founded in 2013 by a leadership team of experienced Cybersafety and Intellectual Property lawyers from the media and advertising industries, **WHITE BULLET** offers companies piracy and cyber risk data and protection, brand safety solutions, and full transparency on their content and advertising placement and digital supply chains. White Bullet also advises policymakers and government bodies on regulatory and compliance programs globally.*





media partners asia

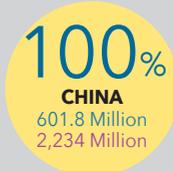
793.5

MILLION PAY TV SUBSCRIBERS

4.3

BILLION BROADBAND SUBSCRIBERS

IN ASIA PACIFIC



FAST FACTS*

POPULATION	3,702,500,000
TOTAL HOMES	1,099,100,000
TELEVISION HOMES	886,800,000
PAY TV PENETRATION *	67%
PAY TV SUBSCRIBERS	793,500,000
BROADBAND SUBSCRIBERS	4,273,600,000

* Includes subscribers to multiple platforms

1. Percent of pay TV penetration and pay TV subscribers
2. Free-to-Air satellite subscribers are excluded from numbers above
3. Based on 14 selected markets

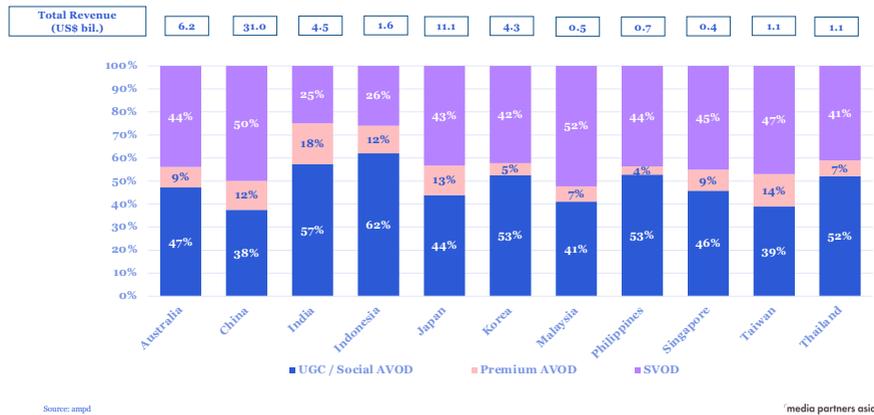
Source: Media Partners Asia
Note: Total broadband subscribers include mobile broadband users and fixed broadband households

STREAMING'S NEXT LEVELS OF GROWTH

The online video sector will generate an estimated US\$65 billion in revenue in 2024, according to Media Partners Asia. Five markets will contribute 88% in aggregate, led by China at 48%, followed by Japan with 17%; Australia, 10%; while Korea and India will contribute a combined 13%. Ex-China, the online video revenue pie will reach an estimated

~US\$34 billion in 2024, with US\$16.5 billion from UGC / social video (led by YouTube, Meta and others); US\$13.5 billion from SVOD (led by Netflix with various global, local and regional players also in the mix); and ~US\$4 billion from premium AVOD (driven by local players in Australia, India, Indonesia and Japan).

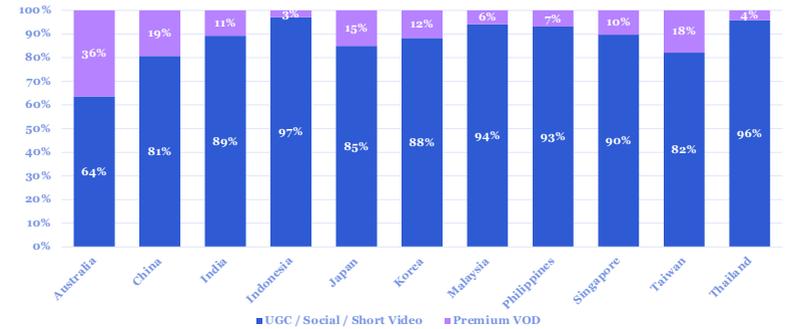
Online Video Revenue By Key Markets (2024)



As much of TV continues to transition online, streaming platforms are increasingly focused on advertising, price increases, connected TV distribution and more impactful investment in content and curated experiences to drive monetization and profitability. As per AMPD Research, investment in premium Asian content, led

by Korean, Japanese anime, Chinese and Indian movies and series and some shows from Indonesia and Thailand continues to have the most impact in terms of driving customer acquisition locally and engagement across the region in terms of travelability.

Share of Total Online Video Viewership (Jan - Sept. 2024)



Note: Premium VOD solely comprises SVOD and freemium platforms
Source: ampd

media partners asia

Key market take-outs include:

AUSTRALIA

Australia is a large US\$6.2 bil. online VOD market with SVOD contributing 44% and premium AVOD, 9%. The introduction of ads by Amazon Prime Video, Netflix, Paramount and Foxtel's Binge and Kayo, combined by incremental growth at local BVOD platforms, is helping to expand the premium AVOD pie, monetized through CTV.

Netflix continues to retain leadership in the SVOD category, followed by Prime Video, Disney+ in tier-1, followed by Stan, Foxtel's streaming platforms and Paramount+ in tier 2. US content continues to drive engagement and acquisition with local content driving viewership on Stan and BVOD platforms. WBD's Max is set to launch in the market in 2025.

CHINA

UGC and social video in China leads video advertising growth in 2024, powered by short video platforms -- WeChat Video Accounts, Douyin, and Kuaishou. UGC short video services will remain mainstream, dominating online video viewership at 81% share, while contributing 38% share of online video revenue. With rising popularity, WeChat Video Account has emerged as an important ad revenue driver for Tencent.

Premium VOD consumption remains under pressure from competing UGC short video services, and captured 19% share of viewership in 9M 2024. Leading platforms are investing in short dramas and mini-series which are becoming popular. Rising consumption of short dramas is being driven by the category's fast pace attracting strong viewership among young to mid-aged demos.

media partners asia

SVOD expansion is slowing with mixed performances across key premium platforms. Tencent Video retains SVOD leadership and remains one of the key growth drivers within the category, while iQIYI lost subscribers throughout the first 9 months in 2024. Due to soft macro and weak consumer sentiment, none of the premium platforms raised prices during the year. MPA estimates SVOD will contribute 50% share of online video revenue in 2024.

INDIA

Led by YouTube and Meta, UGC and social video contributed 89% share of online video viewership in the first 9 months of 2024, and will capture 57% share of online video revenue in 2024. After taking a breather in 2023, the SVOD market experienced a sharp rebound, with the number of subscriptions rising from 110 mil. in Q4 2023 to 120 mil. by the end of 1H 2024. By subscribers, Disney+ Hotstar, Jio Cinema, Netflix and Prime Video lead the SVOD market.

Premium video monetization and viewership is skewed in favor of the sports genre, dominated by the IPL on Jio Cinema and the ICC T20 World Cup on Disney+ Hotstar. Combined the two sporting events accounted for ~70% of premium video ad revenues. Since Q4 2023, heightened M&A activity halted commissioning and acquisitions of new projects, except for Netflix, which capitalized on the buyer's market to aggressively acquire streaming rights to

post-theatrical hits and experiment with new content formats. Netflix, Jio Cinema, and Disney+ Hotstar collectively captured ~70% of premium video revenue and 60% of total viewership.

With the onset of the festive season and upbeat consumer sentiment, advertising spending will remain robust in 2H 2024. However, with no major sports events, spending will shift toward tentpole non-fiction shows on premium video platforms, with a significant portion moving back to high-reach UGC platforms like YouTube and Meta.

INDONESIA

Online video revenues will reach US\$1.6 bil. in 2024, up 18% Y/Y. UGC/social video platforms will contribute 62% share, with premium VOD platforms (SVOD and premium AVOD) capturing the remainder.

YouTube and TikTok remain behemoths in reach and engagement, and lead UGC category viewership, commanding 97% of online video engagement in Indonesia. Together with Meta, YouTube and TikTok dominate video monetization,

Premium VOD is growing with SVOD economics bolstered by price increases and rational packaging, benefiting Netflix, Vidio, Viu and Disney+. Viewership consolidates around three key players - SCMA's Vidio, Netflix and Viu, each with a compelling and unique service offering. Vidio is a leader with sports, airing popular local and international football matches

as well as local series. Netflix captures high income viewers with its premium Korean and US series supplemented with local movie acquisitions. Viu's viewership is driven by Korean series supplemented with limited local originals.

JAPAN

In the first nine months of 2024, UGC and social video had 85% of online video viewership, with YouTube the category leader while TikTok continues to gain viewership share rapidly. Premium video platforms maintained share at 15%.

Japanese anime is a core pillar of online video demand, accounting for 36% of premium VOD engagement in 9M 2024, largely driven by SVOD platforms Amazon Prime Video and Netflix, which boast extensive non-exclusive anime libraries.

The premium VOD category is expected to generate US\$6.2 bil. in revenue in 2024. Seven platforms – Amazon Prime Video, Netflix, U-Next, TVer, Disney+, Abema TV, and Hulu Japan – will account for 74% of category revenue, generating a US\$4.3 bil. in revenue (incl. TVOD and advertising). Netflix and Prime Video led monetization with revenue shares of 17% and 15% respectively, followed by U-Next at 13%, while TVer, Disney+, Abema TV each had 7%.

U-Next emerged as the top domestic streamer in Japan, with 4.5 mil. subs by end Q3 2024. In September, U-Next

entered into exclusive partnership with Warner Bros. Discovery (WBD), to launch Max as an integrated branded zone on U-Next. The partnership grants U-Next users access to exclusive day-and-date (simultaneous with U.S.) for HBO series and HBO Max originals. Under the agreement, U-Next's procured content will also be distributed worldwide on Max.

Premium AVOD, driven by local BVOD service TVer, remains the fastest growing vertical. TVer aggregates much of Japan's FTA TV dramas, variety, news and sports on its ad-monetized platform. TVer secured streaming rights to 2024 Paris Summer Olympics. Abema TV, the largest freemium service in Japan, continued to gain premium AVOD share with an expanding user base. Abema's AVOD tier continues to make headway with local news and variety programs. Ad-supported tiers from Netflix and Amazon Prime Video and Disney+ are also expected to contribute going forward.

KOREA

Online video revenues will reach US\$4.3 bil. in 2024, up 15% Y/Y. UGC and social video platforms have 52% share of revenue, with premium VOD platforms including SVOD and AVOD, capturing the remaining 48%. Led by YouTube, Meta, and increasingly Tiktok, UGC & social video had 88% share of online video engagement.

SVOD monetization is driven by five key brands – Netflix, TVING, Wavve, Coupang

media partners asia

Play, and Disney+. Local content and sports continue to drive SVOD market growth. TVING and Netflix retain the highest share of exclusive or original titles in Korean dramas, variety, and reality. All leading platforms carry popular sporting events such as 2024 Summer Olympics (Wavve), FIFA World Cup Qualifiers (Coupang) and KBO & UEFA Euro (Tving).

In spite of a low base, premium AVOD remains promising. TVING has introduced an ad tier and is growing this revenue stream from 2024 onwards while Netflix introduced an ad tier earlier in 2023 with modest impact to date. While Naver and Kakao remain important within the category, the rapid rise of FAST channels is expected to be another key growth driver.

Total investment in Korean online video content will remain flat at US\$1.6 billion in 2024. After significant increases in online video production spending over 2020-22, investment growth has slowed in 2023-24, particularly as Netflix's spending in the market has shifted to steady state.

TAIWAN

Total online video revenue will reach US\$1.1 bil. in 2024, with SVOD capturing 47% revenue share, versus 39% from UGC and 14% from premium AVOD. YouTube continues to dominate UGC consumption in Taiwan that captured 82% share of viewership. Within premium VOD, seven brands – Netflix, Disney+, FriDay, MyVideo, Hami Video, iQIYI Taiwan, and LineTV – drive 76% of premium VOD viewership and 77% of industry subscribers.

The online SVOD category continues its strong momentum to expand 18% Y/Y in revenue in 2024. Netflix retains leadership in subscribers and SVOD revenues, while Disney+ is in second spot, benefitting from renewed partnership with Taiwan Mobile and bundled offers. Max launched with Taiwan Mobile in Nov. 2024.

Chinese and Korean dramas, along with Japanese anime, were the primary drivers of engagement across premium VOD platforms, capturing ~77% of total viewership. Chinese content, predominantly scripted dramas, led both engagement and acquisition, with Netflix emerging as the top contributor, followed by iQIYI.

THAILAND

YouTube and TikTok captured 96% of online video viewership in Thailand. Classified YouTube viewership is driven by local content creators, kids content, FTA channels (Workpoint, Thairath, GMMTV with both One31 and GMM25 content) and music, while personalized user-generated feeds power TikTok.

Premium video platforms captured 4% of total online video viewership. The premium VOD category is competitive, with 5 major platforms – TrueID, Netflix, WeTV, Viu and iQIYI – and a collection of local broadcaster owned streaming services (BEC World's CH3Plus, One Enterprise's OneD) in the mix. Chinese and local entertainment are leading content categories driving premium VOD engagement, Thailand is SEA's largest

SVOD revenue market. Netflix leads with local content and originals key acquisition driver, followed by telco-operated aggregators TrueID and AIS Play. Chinese platforms WeTV and iQIYI continue to build reach and engagement, on top of Chinese content, while local acquisitions

and originals have also driven customer acquisition and monetization across both platforms. Local acquisitions, Korean dramas and Chinese dramas continue to drive acquisition and engagement on Viu's free and paid tiers. ■

*Established in 2001 and with offices in Singapore, India and Hong Kong, **Media Partners Asia (MPA)** is the leading independent provider of research, advisory and consulting solutions for APAC media & telecoms industries. Our reports are widely used and sourced by companies for business planning, strategy and capital market transactions. Our consulting solutions help clients enter new markets, launch new products and acquire businesses with our team providing commercial due diligence, customized research and local partnerships. Our offering includes ampd analytics, measuring consumer behaviour across the digital economy with passive measurement panels and unique technology across Southeast Asia, India, Japan, Korea and Taiwan. Our clients include the major global and regional streaming platforms; Hollywood, UK, local and regional studios; telecom companies; and consumer brands.*

For more information, please contact Lavina Bhojwani, Head of Business Development at lavina@media-partners-asia.com

MPA website: <https://media-partners-asia.com>

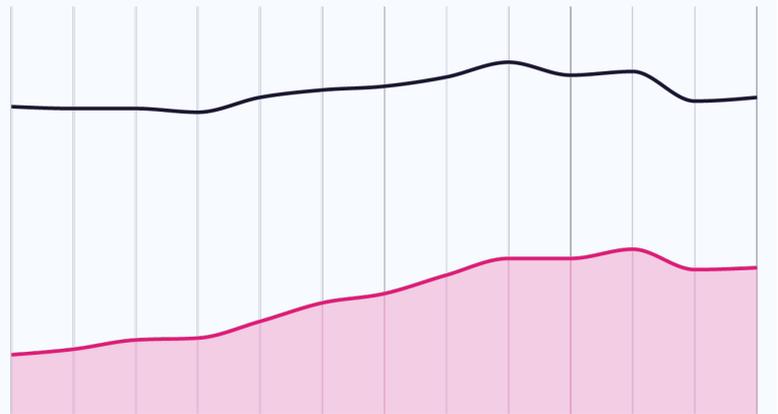
EMERGING TRENDS IN THE TV SPACE: TIPS FOR ADVERTISERS IN 2025

Across APAC, TV viewing time is pretty stable

Average daily time APAC consumers (outside China) say they spend watching any type of TV in h:mm, and the % of that time that online streaming takes up

● Total TV time ● % of TV time devoted to streaming

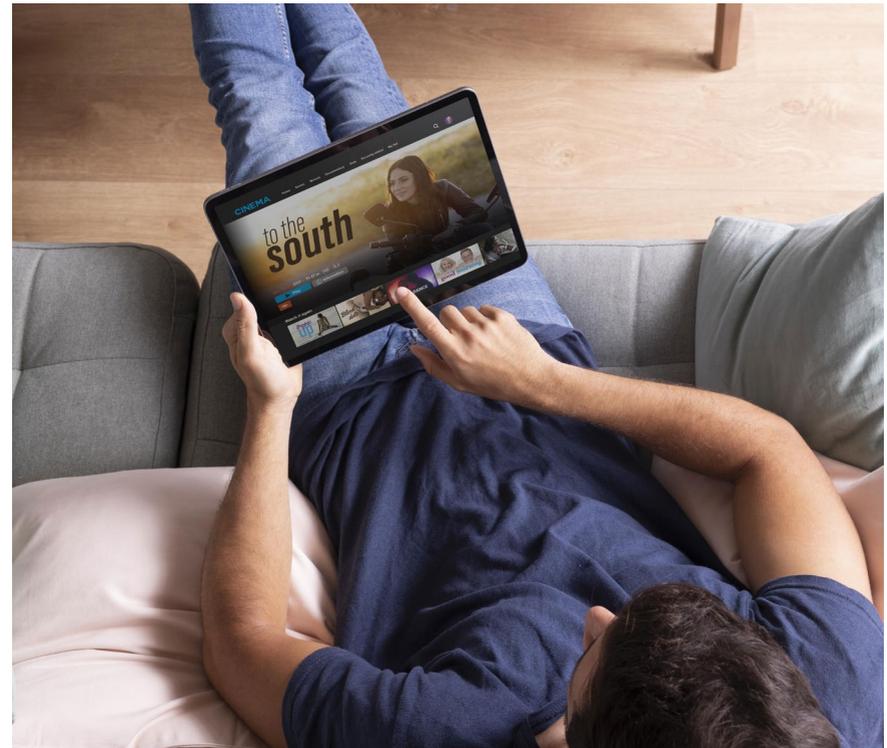
2:46	2:45	2:45	2:43	2:51	2:55	2:57	3:02	3:10	3:03	3:05	2:49	2:51
19%	21%	24%	25%	29%	34%	37%	41%	44%	46%	48%	46%	46%



2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

Source: GWI Core Q4 2012-Q2 2024 | Base: 1,581,151 internet users in 13 APAC markets aged 16-64

(Markets included in this chart: China, India, Indonesia, Japan, Philippines, Vietnam, Thailand, South Korea, Malaysia, Australia, Taiwan, Hong Kong, Singapore, New Zealand)



TV habits rarely change; they evolve. The average number of minutes APAC consumers spend watching TV hasn't moved much, if at all, over the last decade. 2020 was a temporary blip, but viewing time has leveled out since then.

It's actually slightly lower than it was in 2018-19, which could be down to some people making cuts to their entertainment budget or spending longer watching clips on social platforms. 6% of APAC streamers say they've canceled at least one TV subscription, while 13% of the region's consumers say they go to TikTok first when looking for something to watch in the evening.

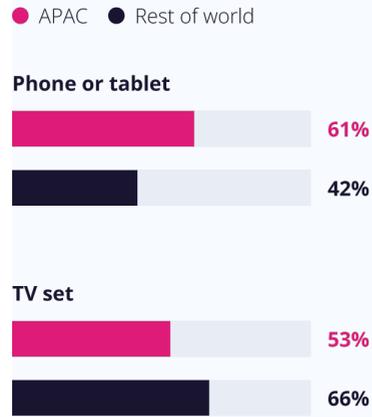
Despite all this, TV engagement is fairly stable and likely to stay that way. It's how and where we watch that'll continue to shift.

The share of total TV time taken up by streaming has climbed from 19% in 2012 to 46% today. If we exclude India and China (which have been streaming-first markets since 2020 and 2017, respectively), we're currently at the peak of this trend.

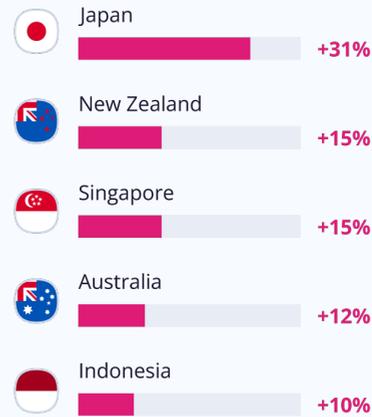
While there's much more competition within and across industries than there used to be, plenty of solutions are being aired.

While more in APAC stream on a smartphone, TVs are stepping up

% who say they use the following devices to watch streaming services



% growth in the number of consumers who watch streaming services on a TV set since Q2 2022



Source: GWI Core Q2 2022 & Q2 2024 | Base: 185,137 internet users in 14 APAC markets aged 16-64

(Markets included in this chart: China, India, Indonesia, Japan, Philippines, Vietnam, Thailand, South Korea, Malaysia, Australia, Taiwan, Hong Kong, Singapore, New Zealand)

Streaming services are most associated with smartphones, but they're definitely not the only device responsible for their growing influence in the TV space.

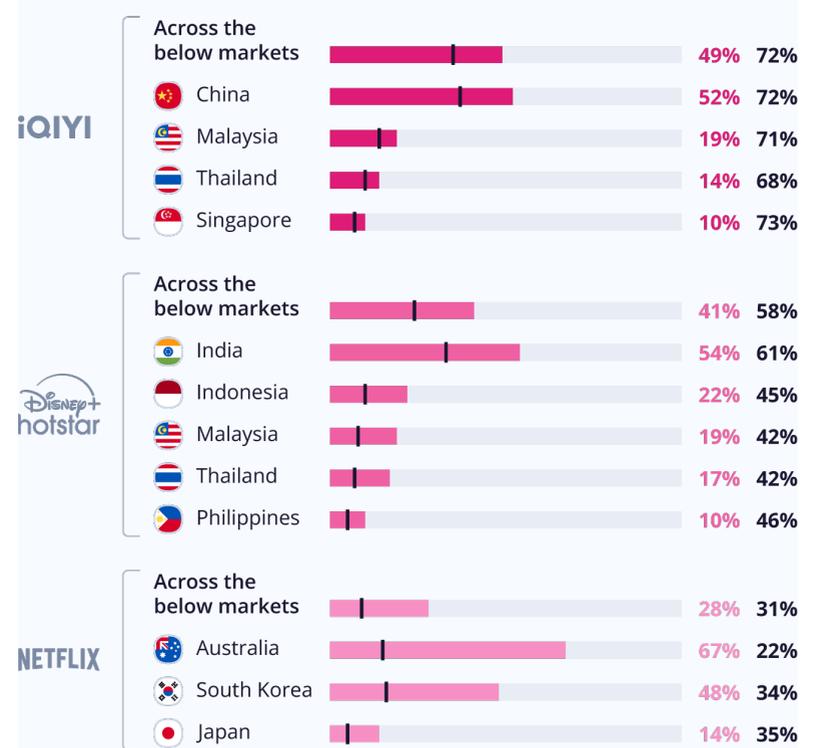
While APAC consumers are much more likely to tune in on their phone than the rest of the world, the number who stream on TV sets is growing in several markets. What's more, the share who own a smart TV is fast-approaching half of all APAC internet users, having climbed another 13% in the last two years. So, advertisers aren't losing opportunities to target those using a second screen, especially in markets that are more likely to stream via

TVs in general like Australia, New Zealand, and Vietnam.

Interactive ads can ultimately go a long way. 22% of Indian consumers who use their phone as a second screen have scanned a branded QR code in the last month; which is why, during the 15th Indian Premier League, the ecommerce app Dunzo displayed one on screen and saw [10x more traffic](#). And with 37% of APAC scrollers saying they frequently see products or services on cooking shows that inspire them to research or buy something, direct links within mobile streaming ads are the logical next step.

FAST and AVOD services have emerged quickly

● % of consumers who use each service ● % of users with a version that shows ads



Source: GWI Core Q2 2024 | Base: 80,751 internet users in 10 APAC markets aged 16+

(Markets included in this chart: China, Malaysia, Thailand, Singapore, India, Indonesia, Philippines, Australia, South Korea, Japan)

Interactive ads are a small part of what streaming services bring to the table: which are ads full stop.

To be clear, APAC consumers are still more likely to say they typically discover products through broadcast TV ads (30%) than those on streaming sites or smart TVs (18%); though among Gen Z in New Zealand, Singapore, and Thailand, the gap is very small.

While streaming platforms are less established as a marketing channel, advertising plans are likely to move the needle, offering brands precise targeting and better transparency on performance.

This year, GWI revamped its question on account types, and we're now able to see which services have the highest proportion of viewers watching ads. Top of the leaderboard is iQiyi (72%), while the relatively new ad-tier on Netflix is already used by 31% of its APAC users.

We have eyes on FAST platforms too: 23% in India use Amazon MiniTV, compared to 44% for Amazon Prime. Being the fastest-growing and arguably the most populous economy right now, India is an extremely attractive market for advertisers, and these sites will help them

reach in-demand audiences. Among the most likely groups to use Amazon MiniTV are people who buy from activewear brands, those who pay for software packages, and virtual reality device owners.

Each platform's ad-tier has a very different audience

% of consumers who have an ad-supported account on the following and...

	Disney+ hotstar	iQIYI	NETFLIX
Are Gen Z	46%	25%	16%
Are Gen Y	36%	41%	28%
Are Gen X	17%	32%	43%
Do the following weekly...			
Drive a car	40%	58%	67%
Eat fast food	40%	35%	34%
Watch a sports match online	39%	28%	29%
Drink alcohol	19%	29%	45%
Are planning to buy...			
Jewelry	34%	16%	6%
A sofa/mattress	31%	15%	14%
A vacation abroad	15%	10%	20%
Car/automotive insurance	12%	20%	10%
A robot vacuum cleaner	6%	11%	6%
Want brands to be...			
Smart	63%	41%	36%
Reliable	50%	47%	66%
Innovative	49%	53%	30%
Funny	27%	24%	21%

Source: GWI Core Q2 2024 | Base: 80,751 internet users in 10 APAC markets aged 16+

(Markets included in this chart: China, Malaysia, Thailand, Singapore, India, Indonesia, Philippines, Australia, South Korea, Japan)

Brands ultimately need to know who they stand to reach when picking a platform, as each site's audience will look quite different to the next.

Disney+ Hotstar's ad viewers are fairly young and prefer brands that seem smart, young, and funny. Because a relatively high number of them are students or people who've bought property recently, more are planning to buy home and furniture items. So, in the hopes of reaching a younger crowd, mattress brand [Kurlon used](#) Disney+ Hotstar to rebrand their products as something not just limited to sleeping, but also active moments like dancing. They ran ads during matches of the 2024 ICC

World Cup in different languages and saw great results.

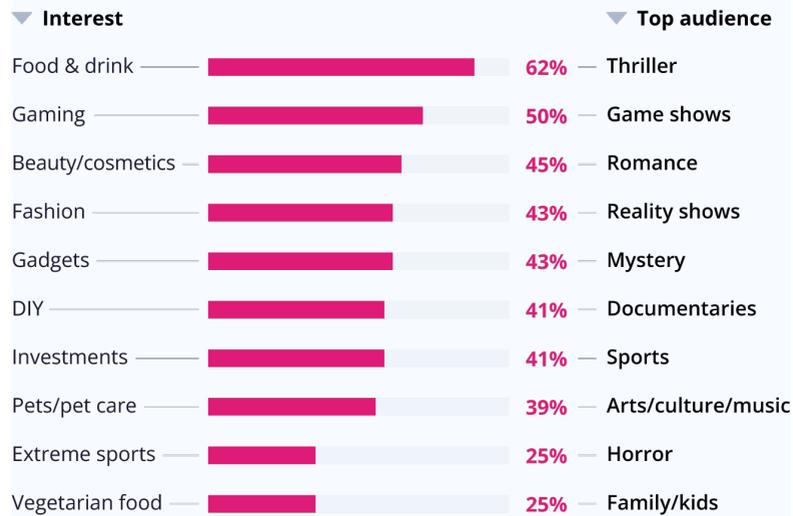
In contrast, Netflix's ad viewers are most likely to be Gen X, interested in buying vacations, and keen on brands that seem reliable. They consume more beer, meat, and wine, and are especially influenced by coupons or special offers.

These varied profiles demonstrate why CTV buyers should always keep their target audience in mind; because it's not just about how many people a platform reaches, but whether it reaches people who are likely to convert.



Matching your product to the right genre

This chart ranks audiences of TV streamers who watch any of our 24 genres, and shows the top audience for each interest. For example, Thriller fans are the most interested in food & drink.



Source: GWI Core Q2 2024 | Base: 35,554 TV streamers in 14 APAC markets aged 16+

(Markets included in this chart: China, India, Indonesia, Japan, Philippines, Vietnam, Thailand, South Korea, Malaysia, Australia, Taiwan, Hong Kong, Singapore, New Zealand)

Once a brand has settled on a site, its next job is creating a video. Consumers are generally on streaming sites to be entertained and marketing should blend into that environment. This is especially true in markets like Australia, Singapore, and India, where more TV streamers want ads to be entertaining than offer discounts.

The content companies place their promotional material beside can also

make a big difference. APAC consumers are generally less against the idea of ad-tiers than the rest of the world, particularly when commercials are relevant to what they're watching or their interests.

While the amount of control they have does vary depending on the platform and package, marketers can even choose the specific genres or shows to [place their ads beside](#); and hopefully the ability to do

this will only improve over time, allowing advertisers to align their messaging to the best environments and avoid the wrong ones.

Our data shows that fans of certain genres have distinct interests. An energy

drinks business might want to run their ads alongside a thriller series, for example, while digital collectible or car brands are best off considering sports channels - given 41% of those who watch them are interested in investments. ■

KEY TAKEAWAYS

Here's a summary of our main trends for advertisers to watch in 2025:

- Time spent watching TV is fairly stable, but more of it is being devoted to streaming platforms. This trend isn't just being driven by smartphones, but also smart TVs.
- At the same time, ad-supported models and tiers are stepping up. OTT TV is starting to resemble the traditional linear experience, with some key differences. Smart devices are making room for interactive ads and shopping links, which brands investing in this space should take advantage of.
- Streaming sites aren't a fully developed marketing channel and advertisers are still finding their feet. Consumer data is needed to decide whether they're currently a worthwhile investment for any given company, and which platform or genres might be a good fit for their ads.



by Shauna Moran
Consumer Trends Manager, GWI

GWI is the leading audience targeting company for the global marketing industry.



FUTURE OF TECHNOLOGY



MEET ME AT THE EDGE: IN PURSUIT OF HYPERPERSONAL & IMMERSIVE DIGITAL EXPERIENCES

From the Summer Games in Paris to the 2024 Football Championship in Europe – mega streaming events have had a profound social and economic impact in 2024 so far. In the media and content world, these global showcases also revealed the seismic shift that is occurring in user experiences, highlighting the increasing need for hyperpersonal and immersive digital experiences.

In Paris, users of the official event app could access augmented reality (AR) features, including a ‘step back in time’ experience from the first ever Summer Games in 1924 that merged online and offline worlds. Real-time artificial intelligence (AI) was used to create videos in multiple formats and languages during the Games. City-wide IoT applications mobilized and optimized city logistics for participants and visitors, from coordinating transportation to managing energy consumption.

CATERING TO A UNIQUE AUDIENCE OF ONE

Today, the sheer scale, speed, latency, and security demands required around media and content delivery are staggering. Consumer engagement habits have shifted, and content providers can no longer deliver a one-to-many experience. Instead, they must provide tailored content

for a segment of one – the individual consumer.

For media and content providers, this raises the bar for underlying computing infrastructure. The use of large, highly centralized cloud computing hubs has served us well in delivering broad-based access to data and media experiences so far. However, delivering rich, dynamic, and personalized media and content experiences of the future demands a need to put compute power closer to the end user.

The edge is where we can optimize the user experience with greater speed and reliable connectivity. By storing and processing data closer to users and devices at the edge, rather than processing data in a central location that may be thousands of miles away, companies can improve network connectivity, reduce latency, minimize costs, strengthen security, and enhance user experiences.

GETTING CLOSER TO THE EDGE WITH DISTRIBUTED CLOUD COMPUTING

The combination of distributed cloud capabilities and existing centralized cloud resources offer a clear path to this high-performance edge computing future. In distributed cloud infrastructure, a

public cloud provider’s entire technology stack is distributed to different locations – wherever a customer needs it. This may include on-premises locations in the customer’s own data center or private cloud, or in third-party data centers or colocation centers around the world, all managed from a central control plane.

Benefits include lower latency as processes are moved closer to the point of interaction; higher performance with faster load times; improved customized experiences with micro-segmentation of services; greater cost savings by minimizing traffic over long distances; and improved security and resilience with more redundancy and reduced risk in a potential central point of failure.

Edge computing also supports the critical need for personalization through AI. By collecting data and processing AI at the edge, emerging technologies like machine

learning, neural network acceleration, and deep learning can scale more easily and provide real-time insights and analytics to drive smarter and faster decision-making, enabling media and content providers to provide more personalized experiences to end users.

POWERING PERFORMANCE AND PERSONALIZATION FOR FUTURE MEGA EVENTS

As more mega events are set to take center stage over the next few years, expect to see newer and more cutting edge-technologies emerge as the hunger to participate, connect, and share these experiences with global communities grows greater. In order to remain competitive, media and content companies must adapt accordingly to meet expectations and maintain positive digital relationships with their audiences – by staying closer to the edge. ■



by Jay Jenkins

Chief Technology Officer, Akamai Cloud Computing

AKAMAI is the cybersecurity and cloud computing company that powers and protects business online. Our market-leading security solutions, superior threat intelligence, and global operations team provide defense-in-depth to safeguard enterprise data and applications everywhere. Akamai’s full-stack cloud computing solutions deliver performance and affordability on the world’s most distributed platform. Global enterprises trust Akamai to provide the industry-leading reliability, scale, and expertise they need to grow their business with confidence. Learn more at akamai.com and akamai.com/blog, or follow Akamai Technologies on [X](#) and [LinkedIn](#).

AI-DRIVEN CONTENT LOCALISATION: BREAKING BARRIERS, REACHING GLOBAL AUDIENCES

As video consumption has become increasingly complex and competitive, mastering effective content localisation for domestic consumption is essential for media and broadcast companies to successfully reach diverse regional audiences. AsiaSat and its subsidiary, AMT, recognise this importance and have integrated the power of Artificial Intelligence (AI) capabilities within its end-to-end media solutions to help customers streamline the content localisation process, thereby extending accessibility and audience engagement globally across language divides.

LEVERAGING AI TO ADD VALUE

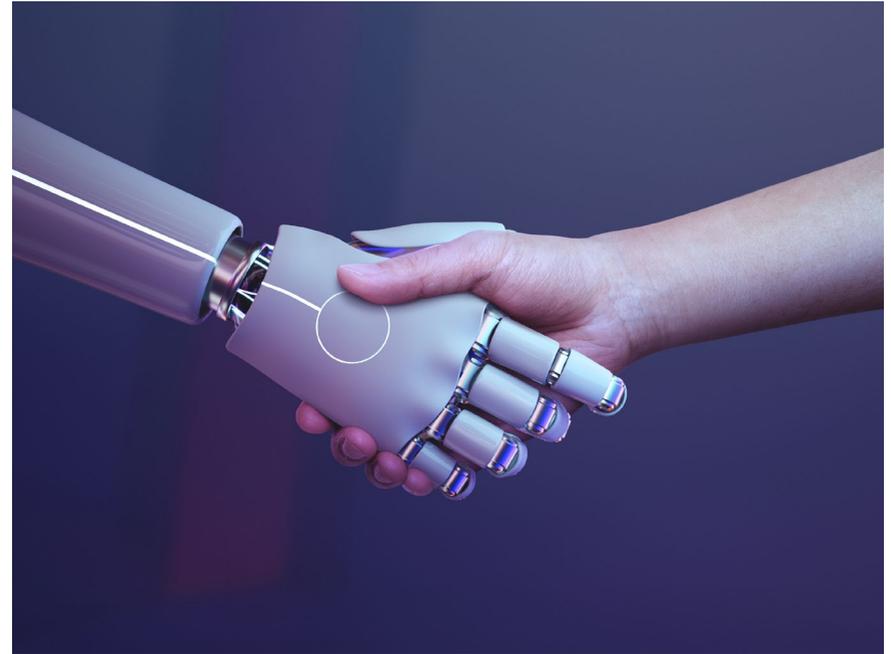
The integration of captions through AI in video broadcasting is transforming the way broadcasters approach content localisation. While the traditional manual process delivers quality subtitles, it is often labor-intensive, time-consuming and costly. AI complements the manual process by leveraging advanced machine learning algorithms to automate parts of the captioning process. This integration not only allows for faster and more efficient captioning at a reduced cost, but also enhances accuracy by minimising the risk of human errors that may occur during manual transcription, making it particularly ideal for captioning real-time content.

THE POTENTIAL OF AI IN CAPTIONING

The applications of AI-driven systems in the broadcasting industry are extensive, covering both pre-recorded and live content. For pre-recorded content, AI can generate and process reliable subtitles much quicker than traditional methods. Moreover, AI technology is also adept at enabling real-time captioning for live broadcasts of news, sports and other time-sensitive events. This dual capability exemplifies a transformative trend in which AI technologies not only complement but also significantly elevate traditional captioning processes, driving both innovation and efficiency.

AI captioning's advanced features include:

- **Adaptive Learning Capability:** Learns from user corrections to generate captions, to enhance accuracy over time through continuous monitoring and improvement
- **Personalisation:** Adapts to specific terminology, jargon and language styles unique to different industries or individual users to generate more natural subtitles
- **Advanced Speech Recognition:** Utilises state-of-the-art deep learning models to accurately transcribe speech in multiple languages and accents
- **Speaker Identification:** Automatically



distinguishes multiple speakers simultaneously in a conversation

- **Customisable Formatting:** Allows customisation of font styles, sizes, colors and positioning to match branding or accessibility needs

ENHANCING VIEWER ENGAGEMENT AND CONTENT ACCESSIBILITY

AI-driven localisation enables viewers from different linguistic backgrounds to access content more rapidly, thus broadening the broadcaster's reach and potentially increasing viewership and advertising revenues. Moreover, it allows broadcasters to meet diverse market demands more swiftly and economically without completely replacing the quality output of traditional captioning methods.

User benefits include:

- **User-Friendly Interface:** Simplifies the captioning process, allowing users to edit, review and publish subtitles with ease
- **Language Support:** Supports a wide range of languages and dialects, catering to global audiences
- **Enhanced Accessibility:** Improves accessibility for individuals with hearing impairments and non-native speakers

DRIVING CONTINUOUS INNOVATION TO ADDRESS CHALLENGES

Despite advancements, AI captioning faces challenges such as its robustness against background music and noisy

environment, improving accuracy in handling multilingual content or dialogue that is heavily accented, contains slang or includes unique cultural references. To overcome these challenges, AMT is committed to enhancing machine learning algorithms and logical reasoning to ensure speed and accuracy in both recorded and live content.

In addition to AI captioning, AMT also delivers a broad range of media technology solutions that span across media contribution, distribution and processing:

- Low Latency, High-Quality Streaming: Global delivery of live sports, events,

conferences, webinars, e-learning platforms and training programs

- FAST Channel and Content Distribution: Leveraging AI in FAST (Free Ad-Supported Streaming TV) channels and content distribution for TV platforms, hotels and through SAILAS TV, a TV streaming app specifically addressing the maritime market
- Personalised and Targeted Advertising: By analysing viewer data and content preferences to deliver personalised advertisements for maximising viewer engagement and advertising effectiveness. ■

Get in touch with one of our experts for a [demo](#) to explore how AI-driven localisation technology can work for your business.



by Andy Chang
Chief Technology Officer, AMT

ASIASAT MEDIA TECHNOLOGY LIMITED (AMT) is specialised in providing innovative media technology solutions. AMT focuses on enhancing media and broadcast capabilities across the Asia-Pacific region, delivering advanced services that include high-quality live-streaming and broadcasting technologies. AMT is a subsidiary of AsiaSat, Asia's premier provider of managed media services with an end-to-end solution that addresses the changing dynamics of the video ecosystem.



THE OPPORTUNITY OF AI ON CONTENT CREATORS & OTT SERVICES IN APAC

In the ever-changing industry of over-the-top (OTT) services and platforms, the Asia-Pacific (APAC) region presents a unique canvas for organizations due to the varied multilingual audiences and media market sizes. As broadcasters and content creators seek innovative ways to increase their business through enhanced efficiency, elevated viewer experiences, and optimized revenue opportunities, new artificial intelligence (AI) technology stands to emerge as a transformative tool. Let's explore how AI can help you boost your media business.

First, let's establish that AI is no longer a futuristic concept; it's a practical tool already being used daily by many leading organizations to reshape how we work. This technology has the potential to reimagine how we create and distribute content today and in the future.

For regional and local broadcasters in APAC, AI-enabled tools offer unprecedented advantages. By working with our global customer base, we've found four key areas at Brightcove in which AI can have the most meaningful impact on media organizations: content creation, content management and optimization, content engagement and monetization, and quality and efficiency.

Solutions that provide automated video editing and AI-driven intelligent content

personalization systems allow for the creation of engaging and culturally relevant content at a fraction of the traditional time and cost. They also help maximize engagement, which increases audience loyalty and potential ad revenue.

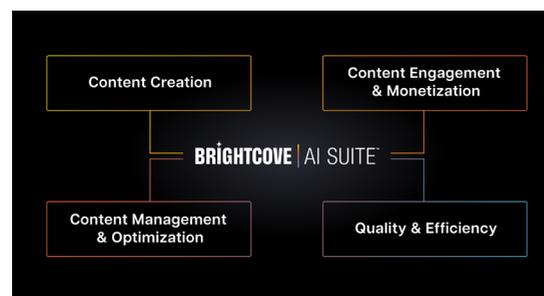
However, for companies trying to engage APAC audiences specifically, it is crucial to have a partner who understands a global scope and can scale. With the varied languages used across the APAC region, the ability to customize content for multiple languages is a necessity. AI-powered transcreation tools for subtitling/captioning and voice dubbing help bridge the communication gap, ensuring that marketing messages and content resonate across different cultures without losing their original intent.

One thing to note for the APAC region is that many local players operate with limited resources and experience in OTT platforms and marketing. This is where user-friendly AI tools can democratize advanced technologies, enabling smaller teams to compete on a larger scale and on the same playing field as the bigger media and content organizations. As teams become comfortable with the technology, these solutions can open up even greater possibilities, like predictive analytics and insights for fine-tuning content strategies and automated ad insertions tailored to viewer preferences.

The potential for AI in the media sector is immense, particularly in the APAC markets. As we look forward, the integration of AI in OTT services is set to deepen, with intelligent automated analytics and machine learning offering deeper insights into viewer behaviors. At Brightcove, we are committed to leading this charge and guiding our customers through the evolution by developing next-generation AI solutions that will further revolutionize content creation, distribution, engagement, monetization, and efficiency overall.

As the media landscape evolves, so too does the technology that propels it. While the technology can be daunting

for first-time users, leading technology providers can act as trusted partners to help broadcasters easily implement the technology in a way that will become second nature to the current workflow. Spending a few moments to set up a platform can save hundreds of hours in the long run. It's important for broadcasters and content creators to find the right partner to help them maneuver AI solutions in a way that streamlines their process and the work, and that ultimately helps them reach and engage their target audiences in the most effective manner. By automating routine tasks, media companies and content creators can focus on doing more of what they do best: telling stories that captivate and inspire. ■



by Greg Armshaw
Senior Director of APAC Strategy, Brightcove

BRIGHTCOVE creates the world's most reliable, scalable, and secure streaming technology to build a greater connection between companies and their audiences. With two Technology and Engineering Emmy® Awards for innovation, Brightcove's intelligent video platform enables businesses to sell to customers more effectively, media leaders to stream and monetize content more reliably, and every organization to communicate with team members more powerfully. Visit www.brightcove.com.



ELEVATING THE ENTERTAINMENT EXPERIENCE: STARHUB'S JOURNEY TO SEAMLESS, IMMERSIVE & CONNECTED LIVING

CONTEXT

In today's dynamic entertainment landscape, global OTT (Over-The-Top) services continue to redefine customer expectations, while the proliferation of diverse content sources presents both opportunities and challenges for TV service providers. To remain relevant, TV operators are increasingly positioning themselves as "**super aggregators**" - curating the best local and global content and simplifying content discovery across fragmented platforms. Their success hinges on their ability to deliver a seamless experience and harness unique data insights to personalise recommendations.

BACKGROUND

StarHub has undergone several strategic transformations in recent years, embracing its role as a **super aggregator** by merging live TV channels, Video on Demand (VOD), and third-party OTT services into a single unified platform. This transformation aims to blur the distinctions between content types, allowing live sports events, VOD, and OTT originals to be accessed seamlessly within one ecosystem. And by integrating third-party apps directly into the StarHub TV interface, the user experience is elevated, providing a single

point of access for all entertainment needs - eliminating the need for multiple apps or devices.

INTEGRATING AI & CLOUD SERVICES

StarHub's innovation journey also includes a stronger focus on **artificial intelligence (AI)** and **cloud technologies**. With AI-driven algorithms, the TV+ PRO can recommend shows based on viewing patterns and preferences across both live and OTT content. Moreover, **cloud-based services** help deliver faster and more efficient content streaming, improving the overall viewing experience while reducing latency, especially for live events like sports and concerts.

ARE SET-TOP BOXES STILL NEEDED?

While mobile devices and smaller screens dominate the OTT space, premium content remains most valued on large, high-definition TVs. For traditional TV customers transitioning from CableTV or IPTV, StarHub's **hybrid Set-Top-Box (STB)** offers a critical bridge to facilitate smooth migration to OTT and app-based entertainment while supporting older TV models that may not be compatible with newer smart TV apps.

Despite advancements in smart TVs,

the fragmentation of TV technologies across households makes the operator's box relevant and ensures consistent performance, overcoming the limitations of older hardware and operating systems.

MARKET SEGMENTATION

Two key segments define today's entertainment market:

1. Convenience Seekers

Consumers who prioritise simplicity and affordability are well-served by smart TV apps and lower-cost STBs. They seek easy access to a wide variety of content without paying a premium.

2. Premium Experience Seekers

A growing segment of consumers is willing to pay more for a **high-quality, immersive entertainment experience**. With platforms like Netflix and Disney producing UHD HDR content with Dolby Atmos, many homes are still ill-equipped to fully experience this content due to limitations in built-in TV speakers and outdated home theatre setups.

To address this premium market, StarHub has developed the **TV+ PRO** that integrates advanced audio, visual, and smart home features into one cohesive device.

Key differentiators include:

- **Android TV** Set-Top-Box with Dolby Vision and Dolby Atmos support, delivering ultra-high-definition visuals and immersive sound.
- **Google Assistant with far-field microphones**, enabling users to control the device with voice commands and integrate it into their smart home ecosystem.
- **Bang & Olufsen-designed speakers** for premium sound quality, delivering deep bass and rich, spatial audio without compromising on form factor.

The TV+ PRO provides a unified interface where users can access all their content—from live TV channels to on-demand content—while enjoying a cinematic experience that merges premium sound and picture quality.

EMBRACING SUSTAINABILITY

In line with StarHub's broader corporate sustainability goals, the TV+ PRO is incorporated with **eco-friendly materials** and is designed to be **energy-efficient**, consuming less power while delivering high performance. The company is also exploring ways to make its hardware more recyclable, contributing to a **circular economy** in electronics.



LOOKING AHEAD: THE NEXT FRONTIER

StarHub is expanding its offerings beyond home entertainment:

- Music Streaming**
 With the TV+ PRO's high-fidelity speakers and seamless voice control, music streaming is becoming a key feature, offering users access to their favourite music platforms with simple voice commands.
- Cloud Gaming**
 Through partnerships with Nvidia and Ubisoft, StarHub has turned the TV+ PRO into a cloud gaming console. Gamers can now enjoy seamless access to both Ubisoft+ and GeForce NOW content on a single device, with built-in microphones and speakers enabling real-time interaction.
- Smart Home Hub**
 With its built-in microphones and speakers, the TV+ PRO can serve as a **living-room smart hub**, enabling voice-activated controls for lighting, temperature, and more, transforming the TV+ PRO into a multi-functional device at the centre of the home.



by Yann Corquex
VP, Entertainment, StarHub

STARHUB is a leading homegrown Singapore company that delivers world-class communications, entertainment and digital services. With our extensive fibre and wireless infrastructure and global partnerships, we bring to people, homes and enterprises quality mobile and fixed services, a broad suite of premium content, and a diverse range of communication solutions, with a commitment to conducting our business in a sustainable and environmentally responsible manner.

CONCLUSION

StarHub's role as a super aggregator is more important than ever, especially as content sources multiply and the demand for premium, immersive experiences grows. Through innovations like the TV+ PRO, StarHub is combining top-tier audio-visual technology with AI-driven data mining, smart home integration and cloud gaming, ensuring it remains at the forefront of home entertainment and driving the next wave of entertainment experiences on the big screen. ■



THE EVOLUTION OF SYSTEM INTEGRATION IN BROADCAST MEDIA

WHAT ARE THE CURRENT MARKET TRENDS YOU SEE HAVING THE MOST SIGNIFICANT IMPACT ON THE MEDIA TECHNOLOGY SYSTEM INTEGRATION (SI) BUSINESS?

With market adoption of cloud computing, the demand for good systems integrators will increase. System Integrators need to swiftly adopt and expand themselves into providing value added services on cloud computing as compared to the traditional system integration of building on-premise infrastructure. With broadcasters and content owners adopting cloud solutions, the need for software system integration with the traditional experience further increases.

The shift towards IP based infrastructure from traditional SDI based set-ups is revolutionizing the broadcast industry. This technology allows video, audio, and control signals to be distributed over standard IP networks, offering greater flexibility and scalability.

AR/VR and Generative AI are gaining traction as new use cases are being experimented and launched.

5G networks promise transformative impacts, facilitating enhanced mobile broadcasting capabilities and immersive viewer experiences, while hybrid broadcast-OTT solutions are expanding

audience reach and monetization avenues.

HDR and UHD technologies are enhancing visual quality, and robust content security measures like DRM are safeguarding against piracy. Sustainability initiatives are also gaining traction, promoting eco-friendly broadcasting practices.

System integrators are pivotal in navigating these trends to drive innovation and deliver enhanced viewer experiences across the broadcast landscape.

WHAT NEW TECHNOLOGIES OR INNOVATIONS ARE YOU MOST EXCITED ABOUT IN THE SYSTEM INTEGRATION FIELD, AND WHY?

AI is one that blends across various domains/areas benefitting the customers, especially with the ability to monetize. This helps not only in broadcast content but all types of media assets, thus helping multiple content owners not just broadcasters, but also others like corporates, religious/spiritual organizations; content owners are now able to organize and monetize/increase their subscribers.

Second is the convergence that is required at the editorial thus enabling a unified platform that helps with content

being able to distribute seamlessly across various distribution platforms.

IP distribution, cloud editing and cloud playout are all benefiting customers to quickly setup their facility and avail on-demand services, though the key here is to keep the cost in check. The ability to expand the system as needed; to be able to integrate various types of broadcast equipment seamlessly and reduction of specialized cables and infrastructure (Scalability, Flexibility and Cost-Efficiency) is driving the migration to IP based infrastructure.

We are also seeing the increasing use of AR/VR technology in studios along with Generative AI content and analysis in news and sports during live coverage.

HOW HAVE CUSTOMER EXPECTATIONS CHANGED IN RECENT YEARS REGARDING SYSTEM INTEGRATION SOLUTIONS?

We can see clearly that the customer is keener from a system integrator to deliver not a box but an end-to-end solution, and how we can have an impact to the business/revenue generation or

monetization. As the technology keeps changing very rapidly, the need to have an open system with ability to change or dynamically adapt is seen as one of the key requirements from a system integrator.

Another trend is that previously the system integrator's role ended after six to nine months when the project was commissioned. Now, many customers desire a longer term 3-5-year partnership model where the system integrator can provide Managed Services to operate the facility that has been built.

WHAT UPCOMING PROJECTS OR INITIATIVES ARE YOU MOST EXCITED ABOUT THAT YOU BELIEVE WILL SHAPE THE FUTURE OF THE INDUSTRY?

Convergence, IP (compressed/uncompressed), Cloud deployments, AI, DAM (for Broadcasters, Digital, Content owners, corporates, religious/spiritual), AR/VR are some of the areas that we envisage in the days to come. ■



by **S Ramesh Babu**
Chief Executive Officer, Benchmark Group

BENCHMARK BROADCAST SYSTEMS is a broadcast systems integrator, headquartered in Singapore with offices in Chennai, Delhi NCR, Kuala Lumpur and Manila. We design, install and commission television stations and channels for customers across Asia. With more than 25 years of broadcast integration experience, our team has been delivering solutions to customers from Bangladesh to Bhutan, China, India, Malaysia, the Middle East, North Africa, Mongolia, Pakistan, the Philippines, Singapore, Sri Lanka, Taiwan and Vietnam.



PLANETCAST'S NEXC PLATFORM: SIMPLIFYING ASIA'S VIDEO COMPLEXITY & UNLOCKING NEW REVENUE

Asia's media landscape is changing fast, driven by the rapid rise of Over-the-Top (OTT) and Free Ad-Supported TV (FAST) platforms. Content providers now face the challenge of managing multiple platforms, formats, and localized content, all while trying to stay profitable. This complexity is especially noticeable in Asia's fragmented markets, where differences in language, culture, and viewing habits add to the operational challenges.

To tackle these issues, Planetcast's NexC platform offers a smart unified solution. Built on in-house IP, NexC streamlines content management and unlocks new revenue streams.

SIMPLIFYING CONTENT DELIVERY WITH NEXC'S UNIFIED PLATFORM

Planetcast's NexC is a cloud-first platform designed to simplify content distribution across broadcast, OTT, and FAST platforms. With the increasing demand for content on multiple channels, managing delivery can become cumbersome, costly and time-consuming. NexC removes these challenges by offering a single-window solution that handles everything from content preparation to distribution.

In Asia's diverse markets, the flexibility of Planetcast's NexC platform is a game-changer. India is a prime example of how rapidly evolving streaming demands are reshaping media services. Media Partners Asia (MPA) predicts that India's

online video market will grow at an 8% CAGR, reaching \$13 billion by 2028. This growth is driven by deeper penetration on one hand and the proliferation of platforms, and formats on the other. Media creators and owners are now required to be present on a host of long and short-form destinations, not to mention distribution alliances that grow reach. The challenges of scalability and a versatile multi-platform content distribution strategy is probably among the most critical ones that media owners and creators will be looking to overcome. NexC's hybrid cloud infrastructure supports this by allowing seamless distribution of both live and on-demand content across multiple platforms, eliminating the complexity of managing various content workflows.

MEETING ASIA'S LOCALIZATION NEEDS

Localization is crucial in Asia's diverse media landscape. The MPA report "Beyond Screens: Streaming VOD's Impact on India's Creative Economy", stated that India's investment in local streaming content reached \$5.8 billion in 2023. With the region's vast linguistic diversity, broadcasters and OTT providers are striving to make content align with local tastes across Asia.

Planetcast streamlines localization with real-time subtitling, dubbing, and multi-language content creation, enhancing audience engagement and

expanding reach across culturally distinct markets. Localization goes beyond translation, focusing on adapting content to reflect local cultures and preferences. In key markets like India and Southeast Asia, where more than 50% of streaming investments go towards local originals, effective localization is essential for staying competitive.

MONETIZING OTT & FAST CHANNELS

As free ad-supported models become more popular in markets with limited disposable income, tools like server-side ad insertion (SSAI) and targeted advertising are crucial for maximizing revenue.

NexC is designed to help media companies monetize their content across OTT and FAST platforms. In 2023, India's premium online video market hit \$1.7 billion, and this figure is expected to almost double by 2028, with Indonesia and the Philippines also expected to show strong growth rates. This growth reflects the increasing importance of ad-supported models in markets in which consumers are attracted to free content.

For Asian broadcasters and OTT operators, combining efficient localization with ad-supported monetization is a game-changer. NexC allows operators to distribute content faster and more effectively, tapping into the growing demand for free viewing options while keeping costs to a minimum.

CUSTOMIZING WITH IN-HOUSE INNOVATION

Planetcast's in-house IP development offers media companies greater flexibility in customizing solutions for specific markets. With over 60 premium OTT platforms operating in India alone, the ability to provide customized content solutions is critical.

By controlling our entire technology stack, Planetcast enables companies to manage content preparation, processing, distribution, and monetization through a fully integrated system. In-house IP speeds up deployment, boosts efficiency and enables us to quickly build customized solutions.

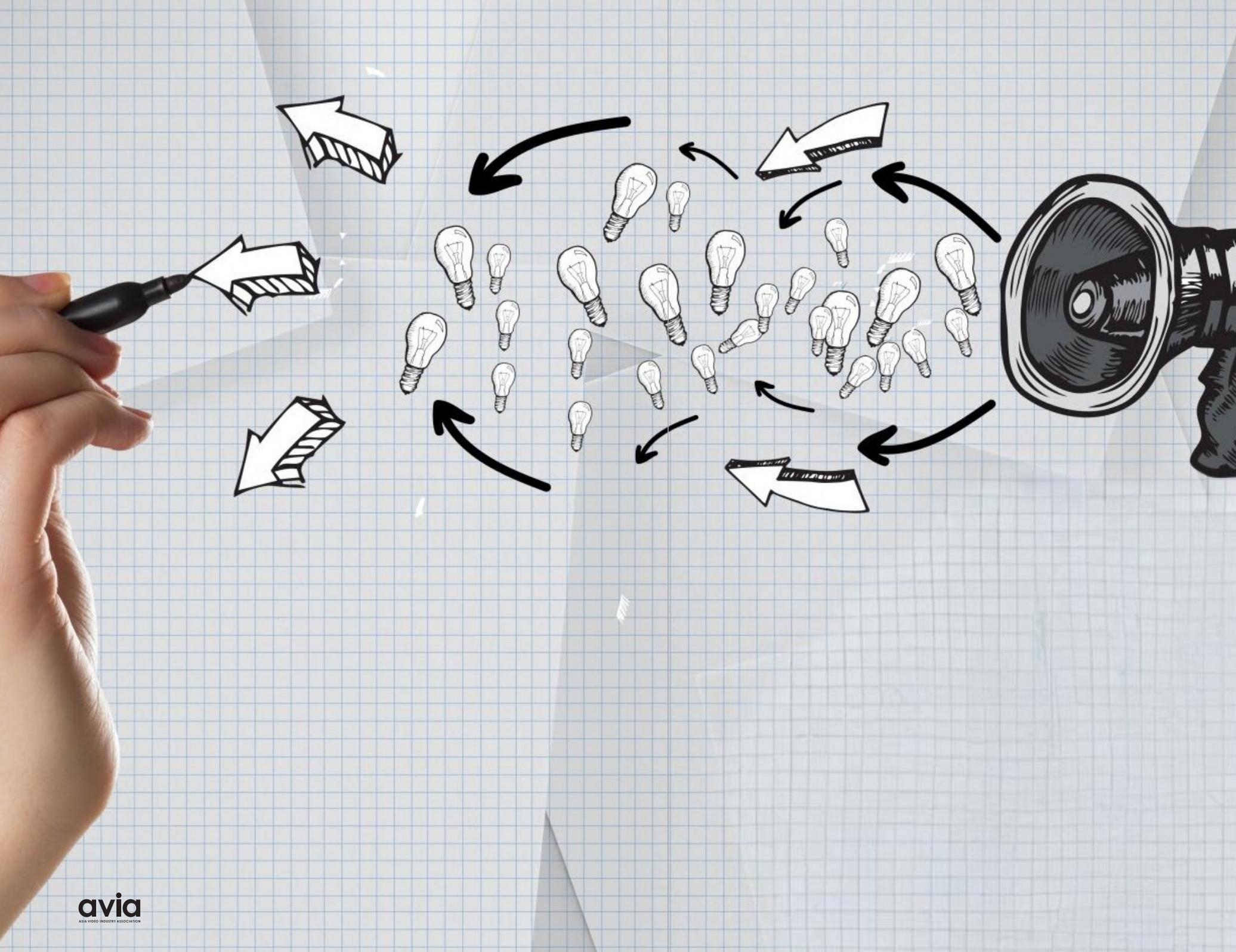
OVERCOMING COMPLEXITY & UNLOCKING GROWTH

With the online video sector expected to lead the future of media in markets throughout Asia, now is the time for broadcasters and OTT platforms to adopt unified solutions like NexC to navigate the region's diverse and fragmented markets. Those that do will not only simplify their operations but also position themselves for long-term success in Asia's highly competitive media environment. ■



by Sanjay Duda
CEO, Planetcast

*Founded in 1996, **PLANETCAST** has been a beacon of innovation in the global broadcast industry for nearly three decades. With state-of-the-art teleports and media centers in Singapore, Mumbai, Delhi, and Cochin, we empower clients to elevate their businesses. Our expertise extends to a cutting-edge suite of cloud services through our unified service platform - NexC, enabling seamless content management, distribution, and monetization. We are your trusted partner for transformative media solutions.*



DIGITAL PUBLISHERS MUST CONTINUE TO CHANGE

Global advertising is expected to grow by 4.6% to reach \$752.8b this year, powered by digital growth of 6.5% ([Dentsu, Global Ad Sales Forecasts Dec 23](#)). Against this backdrop, whilst the market continues its path of intense change, the drivers of change remain very familiar. Advertisers, agencies, publishers, intermediaries and regulators continue to adapt and adjust as these changes play out - and BBC Studios has embraced these changes head on.

Despite driving advertising growth, there are signs that the digital market is maturing, and that annual growth expectations are flattening (6.3% three-year annual compound growth rate 2023-26). The market naturally rewards larger publishers over smaller publishers, but as audiences fragment, what counts as a small publisher keeps expanding. Although ad-free subscription is still expanding in Asia, advertising has a bigger share of the market and we are seeing every major CTV service rushing to introduce cheaper ad-supported tiers with varying degrees of success. Furthermore, what counts as a publisher is expanding with the growth of retail media.

The first driver of change is the increased supply of inventory and new ways for advertisers to reach key audiences. In the absence of double-digit growth and the pervasive economic uncertainty, not

everyone can win. Some form of market consolidation will be necessary. Successful publishers need to cut through with audiences in terms of brand resonance and quality of content. BBC Studios launched the new BBC.com website and BBC app at the beginning of 2024 as a class-leading showcase of our factual output across the world. As the world's most trusted international news brand and Asia Pacific's no.1 international online news brand (BBC News Brand Tracker, Kantar) we are investing to provide a premium user experience for the 411m people we reach weekly, as well as our advertisers.

The second driver of change is AI and automation. Non-generative AI has been with us for some time. Interpretation and prediction from large data sets continues to offer new opportunities for publishers to package 1st party data for advertisers. Automation based on patterns that update with machine learning can help optimize campaigns through precise targeting and efficient ad placements. Generative AI is beginning to encroach on the space occupied by creatives and may be able to drive down costs over time. BBC Studios StoryWorks leverages our reputation for bringing global stories to global audiences and our position as a premium publisher and content creator to design bespoke campaigns for clients. We can deliver integrated, cross-media campaigns that

combine digital and traditional channels, such as advertising on our BBC Earth channel or sponsoring live events in Asia, to create more cohesive and impactful brand experiences.

The third driver of change is data privacy and regulation. Regulators continue their fight to protect users' data and privacy. Google finally stopped deferring the decision on cookie deprecation, but then handed it off to users to decide individually. With customers reaching saturation point for paid subscriptions and the rise of FAST channels, there is a recognition that data-targeted advertising, when used responsibly, is a legitimate revenue stream that offsets the cost of

content to the consumer. BBC Studios employs best-practice data management and retention policies to build on our reputation for trust. We want to increase engagement with users through authenticity, transparency and great content.

As we turn the page on 2024 and look forward to 2025, digital advertising is expected to continue its growth, albeit at a slower pace. Increasing inventory, technological advances and an empowered audience willing to trade anonymized data to reduce spend on content will continue to drive this growth. ■



by James Wildbore

SVP & GM Global Ad Sales, BBC Studios

BBC STUDIOS is the BBC's global content company. Able to take an idea seamlessly from thought to screen and beyond, the business is built on two operating areas: the global Content Studio, which produces, invests and distributes content globally, and Channels & Streaming, with BBC branded channels, services, digital news platform BBC.com and joint ventures in the UK and internationally.

TRANSFORMING LIVE EVENT ADVERTISING IN ASIA

Streaming in Asia is soaring as premium digital channels replace traditional TV for live sports, news, and events. Notably, a [recent study](#) revealed that 75% of premium OTT users (e.g., Netflix, Vidio, Viu, WeTV) reported streaming as the best content quality compared to user-generated video categories. This high level of engagement offers marketers a great chance to reach an attentive audience, as ads during live events can notably enhance brand image and message delivery.

Historically, inventory for high-profile events was sold through traditional linear TV methods like upfronts, which required significant investment and long-term commitments. The transition to streaming TV has made programmatic buying more flexible and cost-effective, especially in Asia, where digital ad spending and efficiency are growing.

CURRENT CHALLENGES IN LIVE EVENT ADVERTISING

Despite its potential, programmatic advertising for live events faces several challenges:

1. Signal Identification

One major issue is differentiating live event inventory from other types of traffic. The OpenRTB content object includes a livestream attribute to indicate

live content, but it often falls short in distinguishing between various types of live events. For example, the ad needs of a live sports game with unpredictable breaks differ from those of a live-streamed TV episode. Enhanced signalling is essential for identifying and optimising live event inventory.

2. Infrastructure Scalability

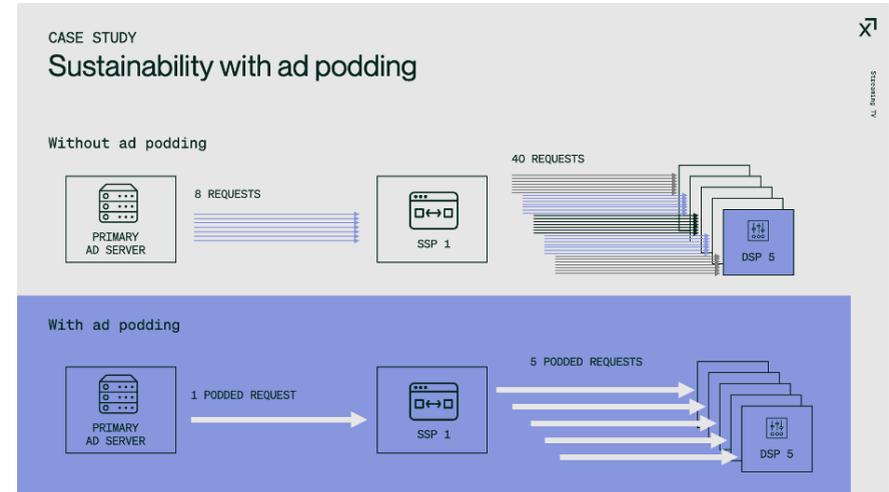
Live events can generate significant spikes in viewership and ad requests, requiring robust programmatic infrastructure to manage these surges. Major sports finals can lead to a high volume of ad requests, demanding scalable solutions to ensure a smooth viewer experience.

3. Fast Activation and Budget Pacing

The dynamic nature of live events requires quick ad activation and precise budget management. Marketers must be able to adjust campaigns in real time to capitalise on peak engagement moments. Effective forecasting and budget pacing are crucial to deliver ads consistently throughout the event and avoid overspending too early.

4. Diverse Monetisation Strategies

Streaming TV supports various monetisation strategies. Traditional share-of-voice (SOV) buying needs to co-exist with targeted programmatic buys. Balancing these approaches can maximise revenue by catering to both broad reach and precise targeting needs.



5. Sustainability in Programmatic

Programmatic advertising offers marketers exciting opportunities to bid on ad placements, but the auction-based process can be resource-intensive. To improve efficiency in live event streaming, ad tech collaboration is crucial. A [study](#) conducted with Publica, The

Trade Desk, Scope 3, and Index Exchange revealed that using OpenRTB 2.6's pod bidding resulted in an 84% reduction in ad selection carbon emissions compared to older OpenRTB protocols. This demonstrates a significant step towards more sustainable programmatic advertising practices.

Index⁷ Exchange

FUTURE PROOFING THE LIVE STREAMING ERA

1. Improved Signalling

The IAB Tech Lab's Ad Break Management Working Group is working on a proposal to introduce a new attribute, content.liveevent, to the OpenRTB 2.6 specification. This enhancement aims to standardise live event signals, improving inventory identification and optimisation.

2. Scalable Infrastructure

Ensuring that programmatic platforms can handle high ad request volumes during peak live event moments is crucial for maintaining performance and maximising revenue.

3. Real-Time Solutions

Developing guidelines for real-time ad activation and precise budget pacing is essential. This includes facilitating linear-style SOV buying with digital

measurement benefits and managing non-guaranteed demand within DSPs' query constraints.

4. Collaborative Innovation

Industry stakeholders are encouraged to engage in ongoing efforts to refine programmatic live event advertising. By sharing insights and working together, we can develop scalable solutions that enhance the streaming experience and provide greater value to marketers.

As streaming TV continues to reshape live event advertising in Asia, leveraging programmatic efficiency and advanced ad technologies will be crucial for maximising effectiveness. Collaboration and innovation across the industry will pave the way for a more dynamic and sustainable future in live event advertising. ■



by **Yogesh Sehgal**

Director, Platform Partnerships APAC, Index Exchange

INDEX EXCHANGE is a global advertising supply-side platform enabling media owners to maximise the value of their content on any screen. As a trusted partner and ally, we connect leading experience makers with the world's largest brands to ensure a quality experience for consumers. To learn more, visit: www.indexexchange.com/au or @indexexchange.



THE TOP FIVE TRENDS

SHAPING THE NEW ERA OF STREAMING TV ADVERTISING IN SOUTHEAST ASIA

Streaming TV continues to surge in Southeast Asia (SEA), with ad-supported viewing powering growth, showing no signs of slowing. Magnite's research, "Streaming TV's New Era," reveals that 71% of TV viewers in SEA now watch ad-supported services, and streaming audiences are now on par with traditional TV viewers. This denotes an inflection point for the SEA region, where the scale has tipped towards streaming—presenting a golden opportunity for both publishers and brands.

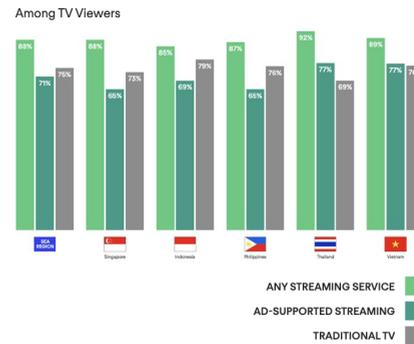
Here are five key takeaways from our research to help the industry better understand the evolving trends shaping SEA's streaming TV landscape.

1. Ad-supported services deliver quality scale

A majority of TV viewers in SEA are watching streaming services with ads, closing the gap with traditional television viewers. Notably, SEA viewers preferences lean toward AVOD, with 79% of TV viewers preferring to watch free or reduced-cost content with ads versus 21% preferring an ad-free experience.

Viewers' intentions to stream more content in the next 12 months indicate that audiences will continue to grow along with the opportunity for brands to reach them.

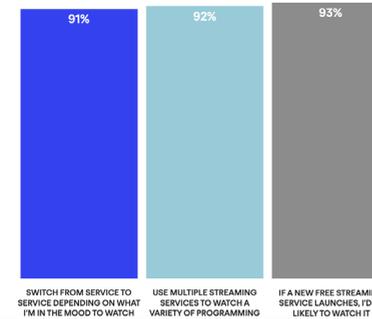
Ad-supported streaming services are catching up to traditional TV viewership



2. Viewers watch ad-supported content across multiple screens and platforms

Despite SEA's legacy as a mobile-first region, smart TV penetration is growing, along with big-screen viewing habits. 67% of SEA ad-supported streamers responded that they are watching content always/most of the time on a smart TV. Even more importantly, smart TV viewership has given rise to co-viewing, with 82% of viewers watching content on a smart TV with other people in an average week. Notably, viewers also watch a wide variety of content across multiple services, with 92% of viewers using multiple services with ads to watch programs.

Viewing habits among ad-supported streamers show their overall attachment to ad-based services



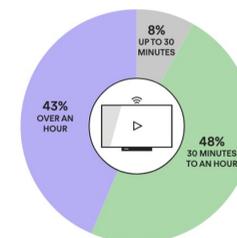
3. Streaming audiences are highly engaged with ad-supported content

Ad-supported streamers are immersed in streaming content for longer periods than social media users due to the short-form nature of social media, which lends itself to scrolling and short viewing sessions.

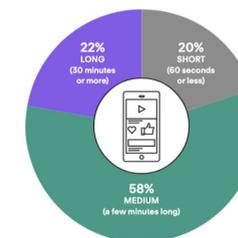
96% of ad-supported viewers watch streaming content for a long period of 30 minutes or more, and 96% report that their viewing is intentional, meaning that they make a point of watching content they like.

By comparison, 88% of social media users launch apps multiple times throughout the day, and each session is brief: 92% of users scroll quickly through social feeds until they see a post that interests them.

Videos a half hour or longer are the most popular on streaming



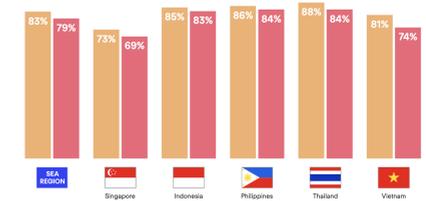
Videos a few minutes long are the most popular on social platforms



4. Ad-supported streaming services deliver the relevant ad experience that viewers want

Personalisation is a key factor in helping streaming services enhance the ad experience for their viewers. SEA viewers clearly value a more personalized viewing experience. 83% of ad-supported streamers are comfortable providing information about their interests if it results in more targeted advertising.

Viewers across markets are willing to share information in order to see relevant ads



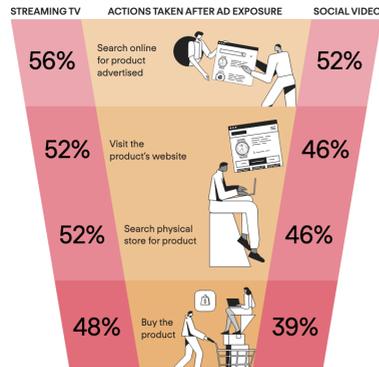
- Comfortable providing information about my interests if it results in a more targeted advertising experience
- Comfortable providing demographics about myself if it results in a more targeted advertising experience

Magnite

5. Ad-supported streaming services are impactful at every stage of the consumer journey

Magnite research shows that streaming is impactful from awareness to purchase. Streaming positively influences the purchase journey, with 68% of ad-supported streaming viewers taking action after seeing an ad on streaming platforms.

Streaming positively influences the purchase decision journey



Meanwhile, exposure to brand messaging across screens further strengthens the relationship between consumers and brands: 94% of ad-supported streamers in SEA said they are more likely to purchase a brand they engaged with across multiple devices (TV, mobile, desktop, etc.) This underscores the importance of a cross-screen strategy to enhance the impact of marketing messages. ■

Download the reports for Singapore, Indonesia, Thailand, Vietnam and The Philippines.



by Marcus Pousette

Senior Director, Platform Development Asia, Magnite

We're **Magnite (NASDAQ: MGNI)**, the world's largest independent sell-side advertising company. Publishers use our technology to monetize their content across all screens and formats, including CTV, online video, display, and audio. The world's leading agencies and brands trust our platform to access brand-safe, high-quality ad inventory and execute billions of advertising transactions each month. Magnite has offices across North America, EMEA, LATAM, and APAC.



THE IMPACT OF CONNECTED TV (CTV) IN A PRIVACY-FIRST WORLD: OPPORTUNITIES & CHALLENGES IN ASIA-PACIFIC

In recent years, the advertising landscape has undergone significant changes, driven by evolving privacy regulations, changes by browsers and consumer expectations. Privacy regulations such as GDPR in Europe, CCPA in the U.S., and the Digital Personal Data Protection Act (DPDP Act) in India have tightened the reins on how data is collected, stored, and used, focusing on consent, data minimization, and enhanced user rights. Today's consumers demand more control and transparency, with 68% of consumers globally concerned about their privacy online.¹

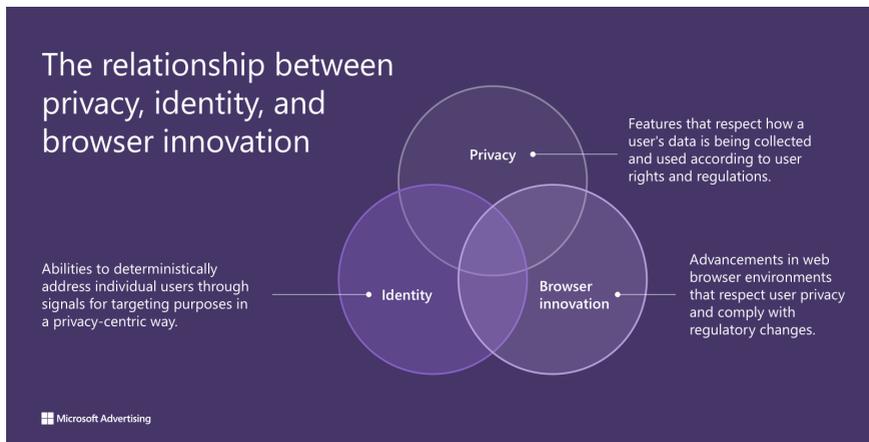
Meanwhile, Google's decision to delay the removal of third-party tracking on Chrome has frustrated the advertising community. Despite the delay, the audience size tracked by third-party cookies has reduced since Apple Safari started blocking all third-party cookies by default in 2020.

Google's proposed solution to place the choice in the hands of the consumer will lead to further decline of targetable audiences on the open internet.

STRATEGIC OPPORTUNITIES IN ASIA-PACIFIC

The industry's challenge lies in maintaining effective levels of targeting and personalization.

Identification in CTV (Connected TV) buying is based on the ID of the device the consumer is watching content on, and the IP address the content is delivered through. Buying and selling platforms use these signals, not cookies, for targeting and frequency management. Unlike the wider open internet, consumers are used to providing login details to access streaming content. International platforms

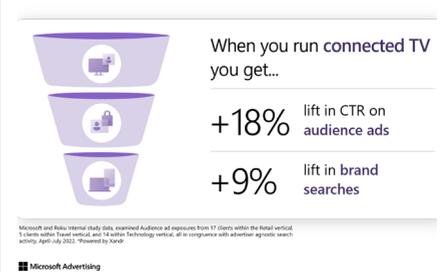


(Netflix, Paramount, Disney) have launched ad-based subscription tiers and major broadcasters such as True in Thailand, Reliance Jio in India and Channel Nine in Australia provide 'live' and on-demand content online, all behind a login. These companies have extensive knowledge of their audiences, and typically build an audience profile based on the collection of devices connecting to a consistent IP address per consumer. The customer opts into this profile being built in exchange for watching, whether that be in free or paid environments.

CTV publishers prioritize transparency and consent, clearly communicating data collection practices to users and offering opt-out options. Technology platforms (like Microsoft) are developing privacy-first initiatives, joining first-party data as well as flexible ID-based and anonymous solutions, to further support publishers and advertisers in navigating the complexities of privacy laws and a fragmented identity landscape. This future-proof design ensures that CTV advertising remains resilient and effective even as privacy regulations continue to evolve and signal loss from the open internet decreases.

HARNESSING CTV GROWTH IN ASIA-PACIFIC

The Asia-Pacific region is experiencing a seismic shift toward CTV, driven by high mobile penetration and burgeoning internet usage. Insider Intelligence forecasts a 15% increase in time spent watching TV and video content in the region from 2023 to 2025. Industry projections for CTV advertising suggest revenues will double within five years as ad dollars increasingly migrate from traditional TV to streaming platforms. Microsoft Advertising's data supports this trajectory, highlighting high engagement levels including 9% lift in brand searches among CTV audiences.²



¹ Privacy and Consumer Trust, IAPP, 2023.

² Microsoft and Roku Internal study data, April-July 2022. *Powered by Xandr

LOOKING TO THE FUTURE

Signal loss within cookie environments will further challenge marketers seeking reach and measurement for their digital advertising campaigns. Mixed media attribution connecting CTV device identifiers to a browsing behaviour will become challenging. As CTV consumption grows, so will the need for marketers to connect with the audience from TV to streaming to browsing and purchasing. We will see increased adoption of clean room technologies such as Habu (Liveramp) & Infusum to connect advertisers with publisher data to compensate for the signal loss across the open internet. Better use of this data leads to greater relevancy in ads and an uptick in brand recognition & sales. We will also see greater integration of brand uplift and purchase intent studies. In Asia-Pacific,

Microsoft Advertising is trialling search uplift studies that connect transaction data from CTV advertising campaigns to browsing and search behaviour across Microsoft properties. Microsoft's identity graph is also available to boost reach across CTV and digital campaigns. The combination of the two offers a targeting and measurement solution safeguarded against signal loss from cookie deprecation while using logged in, consented data.

At Microsoft, we believe in an advertising world where advertisers are not choosing between privacy OR personalization but can achieve both. If we think of privacy not as a blocker but as a forcing function for delivering great advertising that respects consumers' rights, we will create better experiences for everyone. ■



by Tom Dover

Senior Director, JAPAC International Partner Sales Lead
Microsoft Advertising

At Microsoft Advertising, we want to make delivering hyper-personalized advertising powered by generative AI simple. Our end-to-end advertising solutions include AI-powered tools for buying and selling advertising against any objective and format. Across Copilot, Bing, MSN, Outlook.com, Xbox, Edge, and more, we're reimagining advertising for the future. Our goal is to create hyper-personalized connections between brands and consumers throughout their decision journey—whether they're watching, browsing, playing, or shopping.



THE ART OF CTV MONETISATION

In the era of digital streaming, the demand for content has soared to unprecedented levels. However, viewers often face a barrage of repetitive and poorly timed ads that fail to align with their preferences, leaving them yearning for a more engaging experience. Concurrently, publishers grapple with the complexities of the CTV landscape, requiring innovative technology to enhance the viewing experience to maximize revenue

CTV Advertising presents a myriad of challenges for streaming Publishers:

- Deliver a TV-like experience
- Generate the highest revenue per Ad break
- Work with Adtech partners who support interoperability
- Provide transparency and controls to Ad buyers

THE ESSENTIALS FOR CURATING EXCEPTIONAL STREAMING AD BREAKS

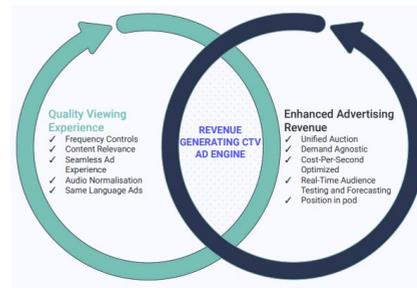
For streaming publishers, the game-changer lies in curating exceptional CTV ad breaks that maximise revenue. Unleashing maximum growth calls for mastery in two critical areas:

Quality viewing experience

Elevating CTV ad breaks to deliver the richness viewers expect, drawing inspiration from experiences found in traditional TV.

Enhanced advertising revenue

Architect best-in-class ad breaks engineered to automatically optimise to achieve maximum revenue



For streaming publishers, capturing viewer attention is paramount to preserving advertiser investment. This requires shaping CTV ad breaks that echo a TV-like experience designed to retain viewers. Delivering a quality viewing experience is achievable with the right ad server, thereby empowering streaming publishers to establish a path for future CTV advertising revenue growth.

ENHANCED ADVERTISING REVENUE

Streaming publishers can now access the cutting-edge tools required to unlock incremental demand by optimising ad breaks dynamically for peak revenue.

Diversify SSPs with a Unified Auction

Limiting yourself to one or two SSPs

risks ignoring unique demand for your inventory. Diversify SSPs to supercharge your programmatic revenue.

Demand Agnostic to Maximize Revenue Potential

Within a unified auction, a monopolistic structure spells trouble for publishers, diminishing the vibrancy of their auctions and narrowing the scope of their agency relationships.

Optimize for a Cost-per-Second Ad Model

Traditional TV has fine-tuned its success using a cost-per-second approach, proving it's critical for boosting revenue. Ensure your CTV Ad Server empowers you to apply this winning formula.

Power Real-Time Audience Forecasting & Targeting

Select an Ad Server that excels in CTV deals with 1st and 3rd party data. Gain real-time data access for optimizing live deals, and improved forecasting for future revenue strategies.

OPTIMISE FOR COST-PER-SECOND

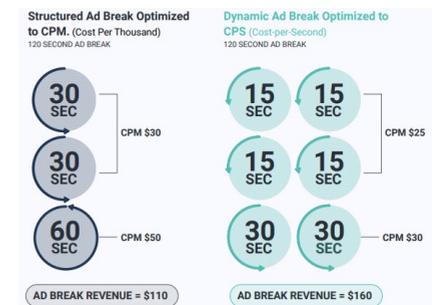
Transposing the rigid format of traditional TV buying (:30 / :60 / :120 spots) onto CTV advertising constrains a publisher's potential to fully leverage the platform to increase business growth.

Embracing a shift from a CPM model to

a cost-per-second ad buy, publishers can unlock the potential of modular ad pods, enhancing revenue and providing a plethora of creative options for structuring impactful ad breaks.

Why it matters? Multiple slots at varying lengths dynamically generated results to maximise revenue for publishers.

Learn from linear TV ad break best practices and maximise CTV yield.

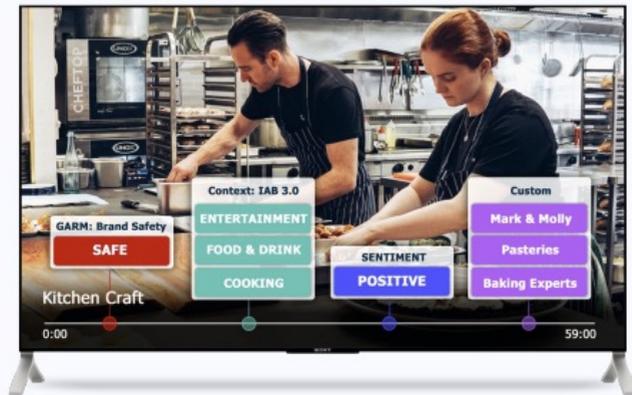


CONTENT RELEVANCE

CTV provides publishers with far richer insights into audience behaviour than traditional TV, creating more chances to offer a more personalized ad viewing experience.

Success involves blending context into audience targeting with a reliable ad server. The right tool automates the bundling of relevant content details into

AI Provides Video Level Contextual Advertising on CTV:



Source: *The Mind on the Stream*, IAS, September 2023.

a deal ID, linking scenes, objects, and logos for contextually relevant brand opportunities.

Why it matters? Brand impact improves by 49%+ when ads match both tone and

context of the content being viewed. Streaming publishers, armed with frame-level analysis tools, can now offer distinctive, contextually relevant CTV packages to advertisers. ■



by **Chris Mottershead**
Commercial Director - JAPAC, Publica by IAS

Publica by IAS is a leading Connected TV (CTV) ad-server and works with many of the world's biggest broadcasters, TV manufacturers, and streaming apps. Headquartered in New York, Publica provides solutions for publishers to maximize their revenue across their CTV inventory through key solutions including a Unified Auction, Ad Pod Management, Audience Management, Server-Side Ad Insertion (SSAI), Contextual Management, Ad Quality Management and Measurement and Verification.



NAVIGATING THE ASIA PACIFIC CTV BOOM: OVERCOMING CHALLENGES & UNLOCKING OPPORTUNITIES

Connected TV (CTV) is establishing itself as a dominant force in the Asia Pacific (APAC) media landscape, transforming how content is consumed and monetised. This article explores insights from leading CTV publishers across the region, highlighting the state of CTV, challenges, and opportunities for growth in this dynamic market.

LEVERAGING PROGRAMMATIC ADVERTISING FOR LIVE SPORTS

A major shift in APAC is the migration of live sports from traditional linear TV to CTV. As consumer viewing habits evolve, so does demand for flexible and targeted ad placements, particularly during live sports. Programmatic advertising has become critical for broadcasters to monetise high-value inventory efficiently. Dynamic Ad Insertion (DAI) and interactive ad formats offer opportunities to engage viewers while maximizing revenue.

However, live sports present unique challenges for ad insertion due to sudden breaks or audience spikes. Real-time bidding and moment-based advertising are emerging to address these complexities, ensuring smoother ad delivery and better audience engagement.

MEASUREMENT AND FRAGMENTATION CHALLENGES

The fragmented nature of the CTV ecosystem in APAC makes audience measurement and attribution particularly difficult. With viewers consuming content across multiple platforms—CTV, linear TV, and digital—there is a pressing need for unified metrics. Standardising measurement across these platforms is essential for accurately evaluating ad performance and ensuring advertisers are reaching their intended audiences.

Without collaboration among industry players and the development of cross-platform measurement solutions, growth may be stunted by the dominance of walled gardens, limiting transparency and data sharing.

INNOVATIVE AD FORMATS AND VIEWER ENGAGEMENT

Innovative formats like shoppable ads, QR codes, and non-intrusive formats like squeeze-back ads are growing in popularity, especially during live sports. These formats allow brands to create personalised, engaging experiences, transforming passive viewers into active participants. They also bridge branding and performance marketing by delivering measurable, interactive experiences.

As commerce media integrates with CTV, these ad formats will increasingly drive engagement and direct sales.

DATA AND TARGETING STRATEGIES: PRIVACY AND PRECISION

Data has become central to CTV's evolution. Publishers and broadcasters are leveraging first-party data, forging partnerships, and refining targeting strategies to enhance campaign outcomes. However, challenges remain around privacy compliance, consent management, and cross-device audience identification.

To address these issues, many broadcasters are turning to solutions with the Sell-Side Platforms (SSP) to assist with activating audience data. First-party data is becoming the cornerstone of effective targeting, but balancing this with stringent privacy regulations is crucial for sustainable growth.

MONETISATION VS. VIEWER EXPERIENCE

As publishers experiment with new ad formats and advanced targeting, they must also ensure that the viewer experience remains seamless and engaging – highlighting the delicate balance between monetization and

user retention. Ad load management, personalized content, and optimised ad delivery are key considerations for reducing viewer ad fatigue.

THE ROLE OF COMMERCE MEDIA NETWORKS AND FIRST-PARTY DATA

Broadcasters and publishers are partnering with retailers to leverage first-party data and boost ad spend. These partnerships use data clean rooms to link ad performance directly to sales, creating closed-loop reporting and accountability. While still experimental, they hold great potential as brands seek measurable outcomes.

CONSOLIDATION AND COLLABORATION: THE FUTURE OF CTV

As the industry matures, further collaboration will be critical to unlocking the full potential of CTV, particularly in areas like cross-platform audience measurement and data matching.

As programmatic advertising plays an increasingly important role in CTV, working with the right partner will streamline operations, enhance campaign performance, and improve efficiencies, helping to overcome the complexities that currently plague the CTV ecosystem.

PubMatic



CONCLUSION: SEIZING THE OPPORTUNITIES IN CTV

The CTV landscape in APAC offers immense opportunities, alongside challenges like audience fragmentation, ease of access for brands and privacy concerns.

Growth will be driven by innovative ad formats, data-driven targeting, and collaboration.

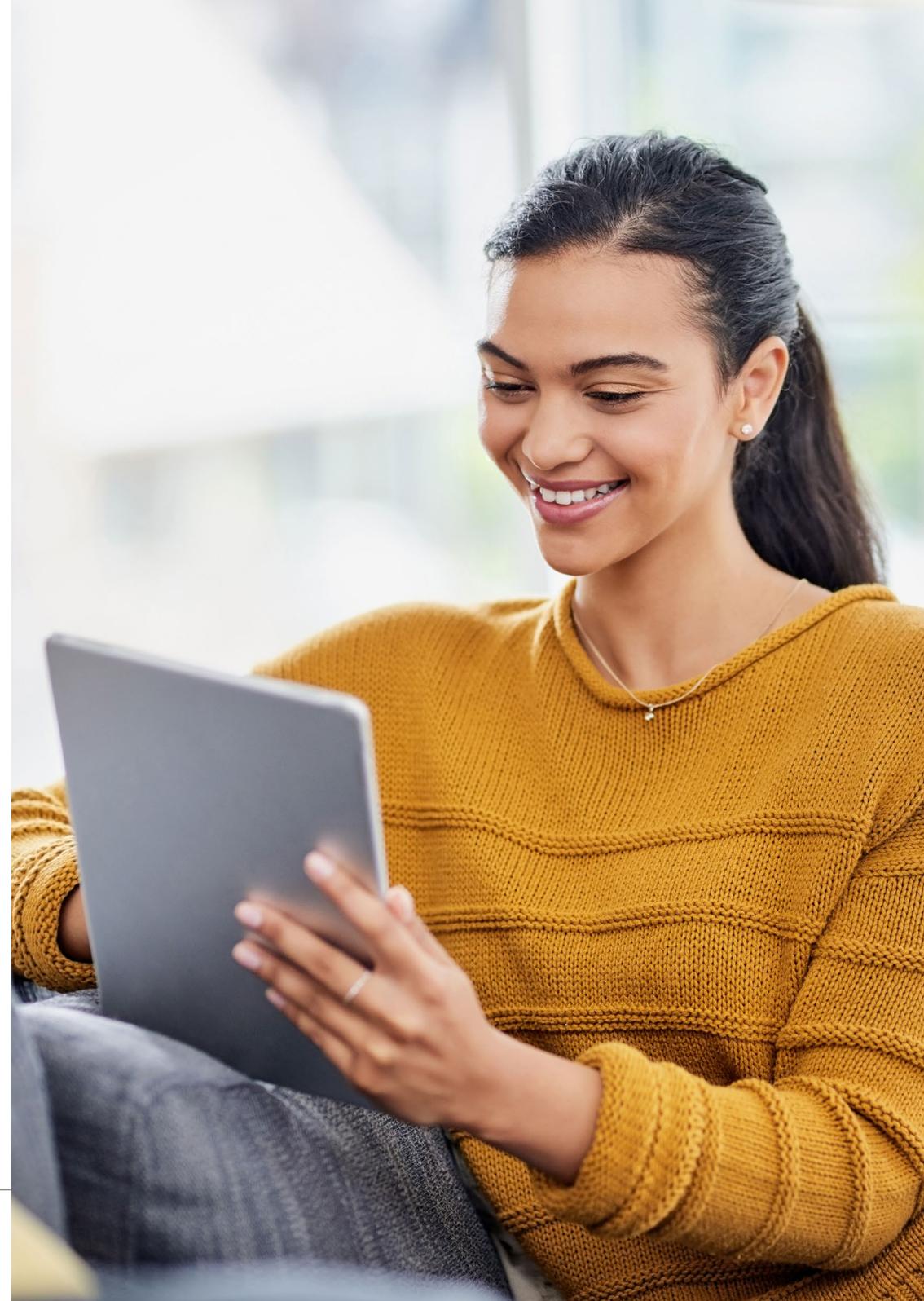
By tackling these challenges, APAC broadcasters and publishers can unlock the full potential of CTV, where the future of TV is streamed and addressable. ■



by Luke Smith

Senior Director, CTV and Online Video, APAC, PubMatic

PubMatic (Nasdaq: PUBM) is an independent technology company maximizing customer value by delivering digital advertising's supply chain of the future. PubMatic's sell-side platform empowers the world's leading digital content creators across the open internet to control access to their inventory and increase monetization by enabling marketers to drive return on investment and reach addressable audiences across ad formats and devices. To find out how PubMatic can support your CTV and video strategy, [reach out to our team](#).



SAMSUNG Ads

CHANGE THE WAY YOU CTV THE SHIFT TO A USER-CENTRIC ERA IN STREAMING AND ADVERTISING

ENTERING THE NEW ERA OF STREAMING CONVERGENCE

Over the past decade, audiences have fragmented as they navigated a growing landscape of content across numerous devices and platforms. Today, we are entering an era of convergence, where ad-supported, subscription-based, and

free-to-view models are coming together. This shift aims to simplify access for consumers while enabling content

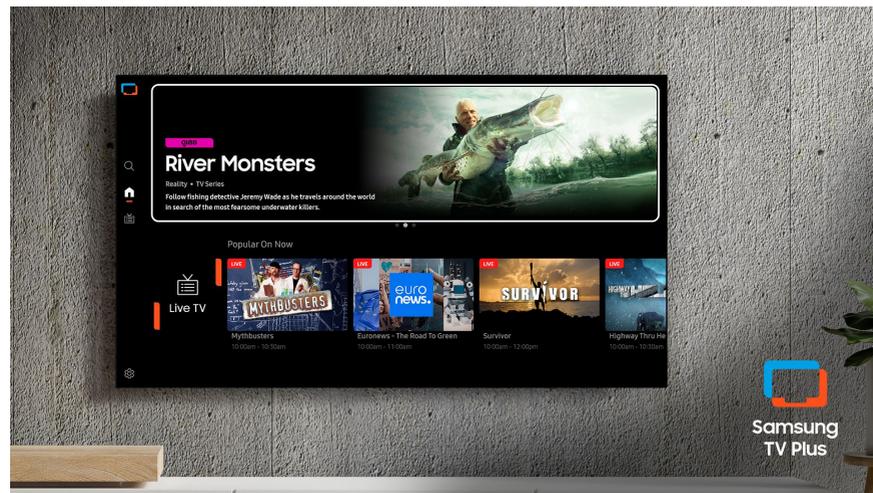


Almost 3B app opens across Samsung Smart TVs in South East Asia Q3 2024

providers to offer a more integrated, flexible approach. In APAC, streaming convergence is already transforming how content is distributed, signalling a major change in both consumption and advertising.

AD-SUPPORTED STREAMING: A RISING FORCE

The Free Ad-Supported Streaming TV (FAST) model is growing rapidly, especially in Southeast Asia. As more Smart TVs are sold and internet access increases, the region is on track to contribute significantly to global FAST revenue, projected to reach \$796 million¹ by 2027. In markets like India and Australia,



consumers are increasingly open to watching ads in exchange for free content. For advertisers, this presents a huge opportunity to reach diverse, growing audiences with an engaging, cost-effective model. FAST also enables the rise of single-show and genre channels, offering tailored, high-quality content experiences that super serve interests. Local content and precise targeting are key advantages for advertisers, as platforms take advantage of subtitling, dubbing, and region-specific programming to engage diverse audiences and reach new audiences abroad.

CONNECTED TV: THE SMART TV ADVANTAGE

Connected TV (CTV) adoption is skyrocketing in APAC, which will account for just under half (47%)² of global Smart TV shipments by 2026. As consumers shift away from traditional TV, smart TVs have become the main gateway for streaming content, reshaping how audiences engage with entertainment on the big screen. This shift provides advertisers with an opportunity to reach consumers via

tailored content discovery and native advertising on Smart TVs. As hardware manufacturers evolve into key players in the TV value chain, they offer new ways for brands to connect with viewers as soon as they turn on the TV.

FROM COMPETITORS TO COLLABORATION: THE NEED FOR STREAMING STANDARDISATION

As streaming consumption continues to surge, the need for standardisation and collaboration is more critical than ever. Industry efforts like Australia's Video Futures Collective (VFC), along with similar initiatives in the UK and the US, are in an effort to streamline fragmented measurement and offer consistent, cross-platform metrics.

VIDEO FUTURES COLLECTIVE



¹ <https://www.statista.com/outlook/dmo/digital-media/video-on-demand/free-ad-supported-streaming-tv-fast/asia>

² Source: Smart TV share TechnavioReport 2023

SAMSUNG Ads

These collaborations help marketers navigate the increasingly complex landscape by providing reliable, transparent insights. With unified standards, advertisers gain the confidence to make data-driven decisions and prove ROI, enabling them to optimise their strategies and reach diverse audiences more effectively across multiple platforms.

KEY TAKEAWAYS FOR ADVERTISERS:

1. TV Moments Matter

Advertisers should tailor strategies to match the viewer's mindset—immersive storytelling for relaxed, "lean-back" viewers and concise, relevant ads for engaged, "lean-forward" audiences—to maximise attention and engagement across CTV.

2. Tapping into the Free Ad-Supported Streaming TV Opportunity

With increasing consumer acceptance of ads in exchange for free content, investing in FAST services presents an opportunity to reach diverse, growing audiences with targeted, affordable campaigns.

3. Leverage Smart TV Advertising

Native advertising through OEMs offers new ways to engage audiences before they even press play, increasing brand exposure from the start.

4. Redefine TV Strategies for CTV

With CTV adoption on the rise, brands must redefine their media strategies to maximise their return on investment across both digital and traditional TV spaces. ■

"As convergence continues to reshape the streaming landscape, advertisers have an unprecedented opportunity to connect with audiences in innovative, meaningful ways across a wide array of platforms."



by Alex Spurzem

GM for Southeast Asia & Oceania, Samsung Ads

Samsung Ads delivers Advanced TV advertising at scale on the world's smartest connected audience platform. Our smart TV advertising solutions are built on a unique source of TV data from millions of Smart TVs across several countries in Southeast Asia.



C O N T E N T



KIRAN MANI

CHIEF EXECUTIVE OFFICER, DIGITAL, JIOSTAR

THE NEXT ERA IN INDIAN MEDIA AND ENTERTAINMENT

India's media and entertainment (M&E) industry has come a long way since the production of Raja Harishchandra in 1913. India's content production capabilities have grown manifold. In 2023, more than a thousand films were [released](#) in the country, and over 3,000 hours of original content [was created](#) for streamers. The country is [poised](#) to become the third-largest M&E market in the world by 2028.

The M&E industry champions Make in India. It has the raw materials and the technological capabilities to create in India, for the world. Creators can handpick uniquely Indian stories — the raw material, and package them into aesthetic finished goods. While tech continues to evolve in other industries, the M&E industry has cutting-edge facilities that are at par with global standards.

The industry's explosive growth is due to the widespread adoption of OTT streaming and increased smartphone penetration. These have democratised access to entertainment. Today, 563 million users [view](#) online videos in India. For instance, cricket fans can experience India's international matches and Indian Premier League (IPL) games for free.

Aside from making entertainment pocket-friendly, streaming services have propelled an interest in regional content. In 2023, more than half of all content [created](#) for streamers was in regional languages.

AN EXPERIENTIAL WAY OF ENTERTAINING

While streaming services have gone wide - offering something for everyone, they have also made investments to go deep. Sophisticated tech advancements have made content viewing immersive and experiential. Most streaming services offer high-definition options, with stunning sound quality due to Dolby Atmos-enabled surround sound. JioCinema viewers can [switch](#) between different camera modes and follow their favourite cricketer on the field using our Hero Cam.

A recent survey [found](#) that around 70% of IPL viewers multitask during matches by interacting with other fans, participating in contests and searching for behind-the-scenes snippets. Streaming companies must cater to these dynamic needs. JioCinema's Hype Mode allows users to multitask while watching sports by checking statistics,

the scoreboard and trivia without leaving the live streaming section.

TRANSFORMING HOW CONTENT IS CREATED, DISTRIBUTED, AND CONSUMED

Leveraging technology has also improved how content is created and distributed. Indian VFX studios are now [producing](#) high-quality content like Brahmastra and Kalki 2989 AD that rivals Hollywood. AI has also enhanced the efficiency of visual effect processes by [automating](#) routine tasks like CGI pre-visualisation. These capabilities continue to grow, and favourable regulatory interventions are expected to bolster the already tech-forward M&E industry.

REVOLUTIONISING THE CONSUMER'S ROLE

Embracing cutting-edge technology can also open new doors for Indian M&E. The dynamic app economy shows the way forward. Social networking apps now house games, food delivery apps facilitate same-city couriers, and messaging apps are helping users transact money. Thus, app interfaces continue to revolutionise how consumers interact with technology, and streaming businesses must do the same.

JioCinema is a first mover in broadening its offerings. For Instance, JioTV+ [aims](#) to seamlessly integrate various services by combining live TV, on-demand shows, apps, shopping, watch parties and interactions into a single platform.

POWERING THE AD ECONOMY

India's advertising sector is growing at [nearly](#) double digit rates. The ad industry owes this upward momentum to digital media. Digital media comprises around half of all ad spending, with online video mediums [receiving](#) a share of over ₹113 billion. Ad-supported tiers have made OTT streaming services an attractive destination for advertisers, especially during marquee events like the IPL.

Many streamers now offer programmatic advertising that enables advertisers to undertake live transactions, with minimal human intervention. As technology continues to evolve, it is a given that collaborations between advertisers and OTT streaming services will generate beneficial results for all.

The success story of Indian M&E is one of resilience and abundance. The industry weathered the production lull during COVID-19 and emerged stronger. Streaming services are a key ingredient in this success. Over time, they have managed to tap into India's vast and diverse demographic and offer content resonant with local culture. New content, coupled with widespread tech adoption, has helped bring Indian stories and perspectives to the world like never before and global M&E will be all the richer for it. ■



ANDY KAPLAN

CO-FOUNDER & CHAIRMAN, KC GLOBAL MEDIA

GEORGE CHIEN

CO-FOUNDER, CEO & PRESIDENT, KC GLOBAL MEDIA



SHAPING THE FUTURE OF MEDIA AND ENTERTAINMENT

In an era where technology and creativity intertwine like never before, the landscape of media and entertainment is undergoing a remarkable transformation. From streaming platforms that revolutionize how we consume content to immersive digital experiences, the way we tell stories is evolving.

At KC Global Media, we are committed to reimagining the future of media and entertainment, continually driving change and pushing the boundaries of creativity and excellence. As we look back on 2024, we are proud to say that we have embraced this evolution and concluded the year feeling more inspired than ever!

AXN CELEBRATED MANY FIRSTS IN 2024: A YEAR OF INNOVATION AND LEADERSHIP

2024 has presented us numerous opportunities and we are thrilled to see AXN make significant strides through strategic partnerships. One of the key milestones is a pioneering collaboration with Tourism Malaysia, spotlighted through our new initiative *Unfading Memoirs*. Hosted by Justin Bratton (*Asia's Got Talent*, *Screaming at Stars*) and Selina Lo (*Hellraiser 2022*, *Lord of the Rings: The Rings of Power*),

and accompanied by food and travel enthusiast Erwan Heussaff (*Let it Simmer*, *Survivor Philippines*), *Unfading Memoirs* allowed us to showcase AXN's unparalleled storytelling prowess and Tourism Malaysia's dedication to highlighting the nation's diverse beauty.

Next, we had the honor of broadcasting ContentAsia Awards 2024, including the red carpet arrivals, for the first time on AXN. This televised event allowed us to come together to celebrate the Asia Pacific regional talents and innovative content in the industry, marking an important milestone for KC Global Media.

We are also proud to have been selected as the exclusive Global Broadcast Partner and be on the judging panel for Miss Cosmo 2024, with the finale aired LIVE on AXN. This collaboration aligns perfectly with our commitment to delivering exceptional content, showcasing diverse and vibrant talent on a global stage and we look forward to creating more impactful content with our partners in the future.



ONE TV ASIA, THE HEARTBEAT OF KOREAN ENTERTAINMENT

ONE TV Asia continues to solidify its position as the undisputed leader in Korean entertainment, and the exclusive Korean experience was vividly demonstrated through ONE Astro Fan Fest, a spectacular three-day event that united fans of Korean star Yeo Jin Goo (*Hotel Del Luna*, *Link: Eat, Love, Kill*, *Beyond Evil*) and Astro's local artistes in Kuala Lumpur, Malaysia.

From popular variety and drama series to LIVE meet-and-greet events, we are committed to offering an unparalleled selection of the latest and most captivating content and experiences, bringing our audience closer to the dynamic and ever-evolving world of Korean entertainment.

ANIMAX, THE ULTIMATE DESTINATION FOR ANIME ENTHUSIASTS

Anime and Japanese pop culture are dynamic and influential forces that shape and inspire entertainment around the world. With the shifts in how audiences



consume anime and changes in the media landscape, we continue to play a significant role in popularising anime and introducing more viewers to Japanese animation. By showcasing everything from timeless classics and critically acclaimed hits to the latest in cutting-edge animation on Animax, and engaging our audiences through on-ground activations, we are dedicated to remain as the go-to destination for all things anime.

REACHING VIEWERS EFFECTIVELY THROUGH KCM, OUR FIRST FAST CHANNEL

To maintain our competitive edge in this rapidly evolving industry, we launched KCM, our premier FAST channel, across major streaming platforms in India in November 2023. We have since expanded our footprint by making it available on Samsung Plus TV in India, sooka in Malaysia; and have no plans of stopping there. This is not only a strategic move to diversify our revenue streams and make our content more accessible, but also one that reinforces our agility to adapt quickly to changes, and stay ahead of industry trends.



KC GLOBAL MEDIA ASIA

A FUTURE OF POSSIBILITIES, INNOVATION AND ENTERTAINMENT

Entertainment is our DNA and the heart of everything we do here at KC Global Media. As the industry continues to evolve, staying adaptable, prioritising audience needs and building strategic partnerships will be key to us being the leader and innovator in this dynamic world.

We are dedicated to redefining the new standard of entertainment as we pursue strategic expansion initiatives in both production and content distribution.

What does the future of media and entertainment hold? We believe it's filled with endless possibilities, excitement, creativity and loads of fun. We are eager to drive the business forward alongside our new leadership team, who will focus on driving revenue growth and exploring new opportunities for the organization.

Join us on this exciting journey as we shape the future together and discover what's next in this vibrant industry! ■



Founded by Andy Kaplan and George Chien, **KC Global Media Asia (KCGM Asia)** is Asia's leading entertainment hub through the production, distribution and programming of quality, ground-breaking content. Its portfolio of premium pay TV channels in Asia includes general entertainment network AXN, anime channel Animax, Korean entertainment channel ONE, and its first FAST (Fast Ad-Supported Streaming Television) channel, KCM.





AVI HIMATSINGHANI

CEO, REWIND NETWORKS



SUBSCRIPTION VIDEO BUNDLE 2.0: LINEAR + STREAMING DELIVERED VIA TELCO AND PAY TV OPERATOR BUNDLES

In March 2020, the COVID-19 pandemic reshaped the way we would live and behave for the next few years. Apart from bringing entire segments of our economy to a grinding halt, global travel halted, borders closed and home-schooling and work from home became the way of life. Within our own industry, there was a boom in content consumption - streamers like Netflix saw unprecedented growth and the stock market recovery was extraordinary.

Fast forward to 2024, while things have stabilized and a lot has gone back to the pre-pandemic norms, our subscription video eco-system continues to go through dramatic turbulence and challenges. The pursuit of profitability remains key amongst streamers, traditional media companies, telcos and pay tv affiliates alike. Some fundamental questions from a consumer perspective arise: How many subscriptions can I afford? How many services do I have time for? How do the players in the eco-system navigate these evolving challenges.

I'm reminded of an AVIA panel that I moderated in Kuala Lumpur in September 2019, titled "The Pay TV and

Subscription Video Ecosystem". The panel discussion left the audience with a thought-provoking question - Who would become the ultimate aggregator of video services? Would it be the traditional operator and telcos bundling data with video or a device, or a super app? Looking at the landscape today, it seems clear that the traditional operator and telco, supported by technology apps with simple UI/UX, single sign on capabilities, has the greatest potential to thrive.

Operators and Telcos in Asia are embracing this new world of multi-device, app based aggregation across markets - Astro Go, Sooka and Unifi TV in Malaysia, CAST and StarHub TV+ in Singapore, Signal Play in the Philippines, IndiHome TV in Indonesia, the examples are many.

It is heartening to learn that linear TV bundles remains an integral part of the video eco-system, alongside the right mix of streaming services.

Across Asia, local content drives viewership consumption in every market. It is also clear that international content fuels monetization via subscription. Telcos and Pay TV operators, and dedicated

DTH players with telco partners, rely on video to enhance ARPU and improve customer stickiness alongside vanilla data only broadband plans. Continued and aggressive investment in enhancing broadband data speed offerings aren't adequately compensated by associated increases in monthly fees. Basic tier linear TV can help operators and telcos drive margins. Bundling OTT streaming services to drive margins can be trickier as the retail price value has been established.

From a consumer standpoint, linear TV still offers significant advantages in terms of breadth and depth of content. My ex-colleague and friend from my Fox days, Jesus Perezagua, founder and CEO at Aquimedia aptly stated in a recent comment: "In my opinion, in a world increasingly focused on on-demand content, linear TV still holds unique value. One of its biggest strengths is convenience - allowing

viewers to simply sit back and enjoy without the endless decision-making. There's something comforting and effortless about turning on the TV and having quality content presented to you, especially in a time when choice overload can feel overwhelming. He adds, "But equally important is the value of curated programming. Skilled programmers and curators bring depth, structure, and a coherent vision to each schedule. This level of curation often results in a higher quality and more engaging lineup, giving viewers a chance to discover something they might never have chosen on their own."

At Rewind we continue to play our role in delivering exceptional value to the linear bundle in this increasingly fragmented world. Our mission is to create branded destinations with a clear proposition - carefully curated playlists that viewers love. ■

Rewind Networks, based in Singapore, delivers premium pay-TV content to 20+ million homes in 11 Asia-Pacific countries. Its channels include HITS, showcasing iconic TV shows; HITS MOVIES, featuring blockbuster films from the 1960s- late 2000s; and HITS NOW, offering contemporary drama, reality, and entertainment shows. Through extensive licensing with leading Hollywood and international studios, Rewind's curated channel destinations offer the best of tv shows and movies to viewers in Asia.



WARD PLATT

FOUNDER & EXECUTIVE DIRECTOR, ROCK NETWORKS



FAST WILL TAKE OFF IN THE ASEAN MARKETS AS IT HAS IN OTHER PARTS OF THE WORLD

"FASTs are a great reach vehicle. The most-desirable and hardest-to-reach consumers are spending most of their time on streaming, and the FASTs will be how brands can best reach them." This is a quote from Alan Wolk, the TV analyst who coined the term FAST. It sums up in many ways why FAST will succeed in most, if not all, markets around the world.

Free Ad-Supported Television ("FAST") is defined as the delivery of linear television channels and VOD content via digital IP streaming technology (rather than traditional broadcast technology). Viewers only need an internet connection to view the content, and no subscription is required for FAST services. Viewers do need to watch ads when consuming FAST.

Why FAST will succeed in ASEAN over the next five years:

TARGETED ADVERTISING

One of the main advantages of FAST over traditional broadcast advertising is its ability to target highly segmented and well-defined audiences (including specific devices like the big screen TV in

the home) through dynamic ad insertion. CPMs on FAST are usually twice as high as those on standard linear television. Advertisers can target viewers based on their location, income levels and which devices they are watching on - advertisers value the viewer watching on the big screen TV in the living room differently than the one watching on the go on their mobile.

SUCCESS OF FAST IN US MARKET

FAST has already become a sizable business in other parts of the world, most notably in North America, parts of Europe, Australia and New Zealand. Let's look at some statistics from the US market:

- More than 50% of US households watch FAST on a weekly basis
- More than 5% of total TV viewing time is on FAST platforms in the US according to June 2024 Nielsen data
- Tubi, Roku Channel and Pluto TV are the FAST players highlighted. Vizio, Samsung TV Plus and other FAST players fall into the "Other Streaming" bucket

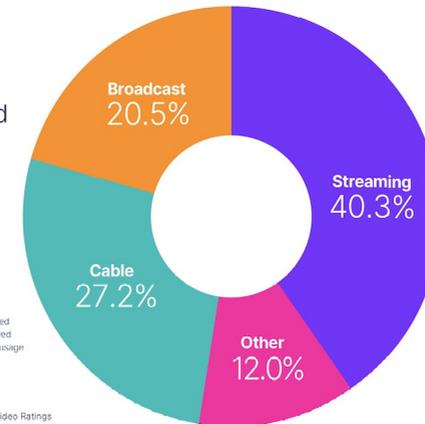


The Gauge™

Nielsen's Total TV and Streaming Snapshot

June 2024

Total Day | Persons 2+



- 6.0% Other Streaming
- 9.9% YouTube
- 8.4% NETFLIX
- 3.1% prime video
- 3.0% hulu
- 2.0% Disney+
- 2.0% tubi
- 1.5% Roku Channel
- 1.4% max
- 1.2% peacock
- 1.1% Paramount+
- 0.8% plutoTV

Linear Streaming (VMVPD/MPD) Apps have been removed from the Streaming category. They have also been removed from Other Streaming and Hulu and Youtube now reflect usage to Hulu SVOD and Youtube Main without their respective VMVPDs (Hulu Live and Youtube TV).

Methodology available @ www.nielsen.com/thegauge
Source: Nielsen National TV Panel Data plus Streaming Video Ratings
Percentages may not sum to 100 due to rounding
Copyright © 2024 The Nielsen Company

- More than US\$8 billion in advertising spend on FAST in US in 2023

The existing TV advertising spend across the ASEAN markets is close to US\$7 billion annually. FAST will capture at least 2% of this revenue over the next five years, resulting in annual FAST revenue in excess of US\$100 million for the region.

GLOBAL AND LOCAL PLAYERS LAUNCHING FAST IN ASEAN

The main global players in FAST (both connected TV manufacturers and stand-alone FAST platforms) and key local players are launching FAST services in key ASEAN markets and are populating their services with locally relevant content.

Global Players - Samsung TV Plus are launching in the Philippines, Singapore

and Indonesia in late 2024; local content is a key part of their roll-out strategy. LG Channels and Xiaomi TV+ both launched in India in early 2024 and both are planning to expand into ASEAN in 2025. TCL Channel has already launched in ASEAN. Pluto and Tubi TV are already in Australia and will expand to the rest of APAC soon. These global platforms will also help educate media buyers in the region to the benefits of setting aside some of their TV budget for FAST.

Local Players - Mediacorp-owned MeWatch has expanded their FAST offering to include not only their own content, but also 3rd party channels and VOD content. Astro-owned Sooka has a robust offering for free channels and VOD content from their own brands as well as 3rd parties. Free-to-air (FTA) players in other ASEAN markets are gearing up now to launch FAST. FTA

players will offer channels with library content in these markets to the FAST platforms. Production companies with deep libraries in these markets will launch FAST channels on these platforms.

ROCK Networks currently offers three FAST brands in the ASEAN region, both as linear channels and branded VOD offerings. Currently, platforms carrying some or all of the ROCK FAST offering in ASEAN include Sooka, MyTV Broadcasting, MeWatch, Samsung TV Plus and TCL Channel. The three brands are as follows:

- Free Movies - Hollywood movies
- Baby Animals - Wildlife
- Jelly Jamm World - Pre-school kids animation

ROCK Networks is highly optimistic about the future of FAST in ASEAN, predicting rapid growth as digital streaming becomes more dominant and advertisers increasingly value the FAST platform's ability to deliver targeted ads. With the region's young, tech-savvy population and rising internet penetration, FAST is poised to become a critical part of the media landscape. As demand for free, ad-supported content grows, ROCK Networks aims to be at the forefront, helping FAST platforms capture a significant share of the ASEAN digital ad market. ■

ROCK Networks distributes content via Linear Pay-TV channels, branded and unbranded VOD, and FAST platforms across the globe. Our multi-genre catalogue contains over 2,000 hours of content including natural history, documentaries, lifestyles, movies and entertainment, short-form digital and preschool kids programming. ROCK Networks offers a portfolio of Media brands ROCK Entertainment, ROCK Action, ROCK Extreme, Global Trekker, ZooMoo, and Golden Chinese Drama Channel.

Visit www.rockentertainment.com for more information about ROCK Networks





ALEXANDRE MULLER

MANAGING DIRECTOR, APAC, TV5MONDE

**TV5
MONDE**

THE INDUSTRY IS CHANGING. BUT IS IT?

The video industry has experienced significant disruption in recent years, driven by the growing success of video-on-demand (VOD) offerings, both free and paid. Traditionally, Pay-TV dominated the industry and was a business model where content providers and TV networks generated revenue from both subscription fees and advertising, with an average monthly revenue per subscriber (ARPU) of around \$10.

The emergence of pure SVOD services like Netflix has significantly disrupted the traditional industry ecosystem, encouraging everyone to join the battle and launch their Direct-to-Consumer (DTC) service. The increasing competition and plethora of content options lead to significant churn, challenging the long-term viability of this business model (and ROI for investors). SVOD providers have unsurprisingly responded by introducing free, ad-supported tiers or raising the prices of their non-ad-supported tiers.

However, as content providers were searching for more ways to monetize their sizeable existing inventory, this shift, coupled with growing subscriber fatigue, has led many to a shift towards

fully ad-supported services like AVOD and FAST platforms.

The proliferation of new service models has led to a complex and crowded industry landscape, with over 2,000 FAST channels in the US alone. This complexity has burdened consumers with an overwhelming array of choices, reminiscent of the pre-disruption era when pay TV aggregators controlled the content landscape.

Intriguingly, some major industry players are now reintroducing a bundled approach. Disney+, Hulu and HBO Max (now Max) have announced their willingness to introduce a new bundled offering. Could it be a return to the 'old aggregating ways'? This new approach prompts us to question whether the industry is genuinely changing or simply reverting to a familiar model with a few adjustments.

The industry is not undergoing a complete transformation but rather an evolution. The core business model of content creation, distribution, and monetization remains, but the execution of these elements has shifted. The introduction of SVOD, AVOD, and FAST

services has introduced more choice and flexibility for consumers while creating new revenue streams for content providers. This adaptability, a testament to the industry's resilience in the face of change, should make the audience feel optimistic about the industry's future.

However, the ongoing fragmentation of the market and the resulting burden of choice for consumers suggest that the industry may still need to adapt to the new landscape fully. The return to bundled offerings directly responds to this challenge, as content providers and distributors seek to simplify the consumer experience and regain some of the control they previously held. This shows that the industry is not just changing but also listening to and

responding to consumer needs, making the audience feel valued and understood.

The video industry is undoubtedly changing with the rise of new service models and a more diverse range of content delivery options. However, the industry's return to bundled offerings also suggests that some of the business's fundamentals may not have changed as dramatically as one might have expected. This resilience and adaptability are key industry strengths, and whether the changes we've witnessed so far represent a genuine transformation or a cyclical evolution remains to be seen. But one thing is sure: the industry's resilience should instill confidence in the audience about its ability to navigate these changes and emerge stronger. ■

TV5MONDE is the world-leading general entertainment TV network in French, broadcasting eight dedicated General Entertainment channels (USA, Latin America, Europe, Maghreb & Middle-East, Africa, French-speaking Europe, Asia and Pacific) as well as two thematic channels (Lifestyle and Kids), to over 437 million homes worldwide, with subtitles in 12 languages. It also offers a global AVOD service – TV5MONDEplus – on top of its specific regional offers designed to meet the needs of the local audience.



LO LOFAI TF
COO, VIU


EVOLVING WITH CONSUMPTION PREFERENCES FOR SUSTAINABLE GROWTH

In the dynamic realm of digital entertainment, understanding and adapting to audience preferences have been the cornerstone of Viu's success since our launch in 2015.

Our journey began by simulcasting popular Korean dramas across Southeast Asia, with local language options available within hours of their telecast in Korea. As Viu-ers evolved from passive consumers to discerning curators, their demand has fueled a rebalance of our Korean programmes with multi-cultural additions. Catering to diverse tastes, our growing selection encompasses trending content ranging from Chinese to Thai as well as locally produced works that resonate with regional audiences.

Beyond content diversity, accessibility has proven equally crucial. By introducing a free ad-supported ("AVOD") option and a paid subscription ("SVOD") model, we have been able to make our service available to a broader audience. This dual approach has played a central role in Viu's growth at scale, helping us become a leading streamer across Southeast Asia over the past decade.

Our Viu-ers have also been eager to engage with their favourites beyond their screens. Observing surging demand for real-world events and immersive experiences, especially after the pandemic, we launched *Viu Scream Dates* in 2023, bringing stars closer to their fans. The success of these events across Indonesia, Malaysia, the Philippines and Singapore underscore the shift in content consumption. Building on this momentum, we have expanded our experiential offerings, including the beloved *WATERBOMB* festival in Singapore in August 2024, creating a holistic entertainment ecosystem that extends beyond traditional streaming.

Today, we witness our audiences craving diversity in content format and interaction. The rise of Web3 technologies heralds a new era of community-driven entertainment. Our entry into this new frontier is marked this year by the launch of our first digital comic series, *TN7*, where Viu invites fans and global creatives to join an exclusive community, co-create content and grow the universe together.

At Viu, we believe the future of streaming lies not only in what is offered, but in



how it is built and experienced. We remain focused on staying relevant, from onscreen to offscreen to shaping worlds together with Viu-ers. As the lines

between creator and consumer blur, our mission is clear: to drive change rather than simply react to it. ■



Jang Ki-yong's Asia fan meeting tour, *Beautiful Day*, held at the Samsung Hall within SM Aura in Manila, Philippines on 28th September 2024.

Viu, PCCW's leading pan-regional OTT video streaming service, is available in 16 markets across Asia, Middle East, and South Africa. The Viu service is available to consumers through a dual model, an ad-supported free tier and a premium subscription tier. Viu showcases premium original productions under the brand 'Viu Original', as well as TV series, movies, and lifestyle programmes from top content providers. Viu Scream Dates, its multi-market live fan-meet offering, extends the Viu experience beyond the screens by bringing stars closer.



TELEVISION AUDIENCE MEASUREMENT 2024-2025

MARKETS	RESEARCH COMPANY	PEOPLEMETER PANEL SIZE (HOMES/HOUSEHOLDS)	RETURN PATH DATA (RPD) PANEL	PANEL COVERAGE	CABLE/ SATELLITE MEASURED	DTT MEASURED	INTERNET, TABLETS & SMARTPHONES	VOD &/OR OTT SERVICES MEASURED	COMMERCIAL BREAK RATINGS FOR PAY TV CHANNELS	COMMERCIAL SPOT LOGS FOR PAY TV CHANNELS	PAY TV REACH & FREQUENCY AVAILABLE	TIME SHIFT VIEWING MEASURED	SOFTWARE
AUSTRALIA	Nielsen TAM on behalf of OzTAM	5,250 (Metropolitan) 2,120 (National subscription TV)	No	Metro areas (5 cities) & nationally for Subscription TV	Yes	Yes	No	National Video player data reported separately	No	No	Yes	Yes	User choice*
	Nielsen TAM on behalf of Regional TAM	3,198 (Regional)	No	Queensland, Northern NSW, Southern NSW, Victoria, Tasmania & Regional Western Australia	Yes	Yes	No	No	No	No	Yes	Yes	User choice*
AUSTRALIA From 2025	OZTAM/ REGTAM	27 Million Synthetic respondents	No	National (Urban+Rural)	No	Yes	Yes	Yes	No	No	No	Yes	User choice* (TVMAP, ETAM, DAY8)
CAMBODIA	Kantar Media	795 Homes (Diaries)	n.a	Phnom Penh, Kapongcham & Battambang	Yes	Yes	No	n.a	Yes	No	Yes	No	Instar Analytics
CHINA	CSM	43,000	No	89 city meter panels, 23 provincial meter panels, 2 diary provincial panels	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Instar Analytics
HONG KONG	CSM Media Research & Kantar	1,000	No	HK Region	Pay TV - Yes; Satellite - Limited to monitoring list of AMS channels, if any	Yes	No	Yes	Based on time band analysis	Supplied by a third party	Yes for subscribers only	Yes	Instar Analytics
INDIA	BARC India	60,000* (*TV+OOH)	n.a	All India (Urban + Rural)	Yes	No	No	No	Yes	Yes	Yes	Yes	Yumi Analytics
INDONESIA	Nielsen	11 Cities 3218 HH: 2,578 (Terrestrial) 640 (pay TV) National Urban 5800 HH: 4,610 (Terrestrial) 1190 (Non-Terrestrial)	3,000 panel for Firstmedia- exclusive	11 major cities, National Urban (Exclude Papua & Maluku)	Yes	Yes	Yes, in Digital Ad Ratings (DAR) & Total Ad Ratings (TAR)	Yes (Streaming Content Rating) 3700 Individual Panel 11 Cities From TV Panel, using Android base Smartphone, Age 10+	No	Yes	Yes	No	Arianna

TELEVISION AUDIENCE MEASUREMENT 2024-2025

MARKETS	RESEARCH COMPANY	PEOPLEMETER PANEL SIZE (HOMES/HOUSEHOLDS)	RETURN PATH DATA (RPD) PANEL	PANEL COVERAGE	CABLE/ SATELLITE MEASURED	DTT MEASURED	INTERNET, TABLETS & SMARTPHONES	VOD &/OR OTT SERVICES MEASURED	COMMERCIAL BREAK RATINGS FOR PAY TV CHANNELS	COMMERCIAL SPOT LOGS FOR PAY TV CHANNELS	PAY TV REACH & FREQUENCY AVAILABLE	TIME SHIFT VIEWING MEASURED	SOFTWARE
JAPAN	Video Research Ltd	10,700 household (sample age>4)	No	32 regions including Kanto, Kansai, Nagoya, Fukuoka, Sapporo, Sendai, Hiroshima, Shizuoka, Nagano, Fukushima, Nigata, Okayama&Kagawa, Kumamoto, Kagoshima, Nagasaki, Kanazawa, Yamagata, Iwate, Tottori&Shimane, Ehime, Toyama, Yamaguchi, Akita, Aomori, Oita, Okinawa, Kochi, Yamanashi, Fukui, Tokushima, Saga, Miyazaki	Yes	No	No	No	No	No	Yes	No	cs/NEX
MALAYSIA	Nielsen	1,100 TV Households in Peninsular Malaysia	No	Across 11 states in Peninsular Malaysia, covering both urban and rural	Astro Pay-TV	Yes	No	No	No	No	Yes	No	Arianna
	Nielsen	300 FTATV Households in East Malaysia	No	Kota Kinabalu and Kuching	No	Yes	No	No	No	No	No	No	Arianna
	Kantar Media	21,000 homes expanded DTAM panel via fusion		National	Yes (Astro)	No	Yes (Astro GO)	Yes (Astro GO)	Yes (all channels)	Yes (all channels)	Yes	Yes	Instar Analytics & AxM
MYANMAR	Myanmar Media Insight	1,320+ HH, M-Diary Panel 6,000+ Individuals	No	6 Key Cities within metro & urban	Yes	Yes	No	No	Yes	No (Selected Channel only)	No (Selected Channel only)	No	Arianna
NEW ZEALAND	Nielsen	900 households (2,250 panel members)	No	National	Yes	Yes	Yes, in Digital Content Rating (DCR)	No	Yes	Yes	Yes	Yes	eTAM
PAKISTAN	Medialogic Pakistan	3000+	Yes (RPD + METERS) Hybrid (Since Feb. 2022)	Over 100 cities Feb. 2022 onwards	Yes	N/A	No	No	Yes	Yes	Yes	No	Instar Analytics
PHILIPPINES NATIONAL	Nielsen	National Panel: 3,500 (2,000 Urban homes (NUTAM) & 1,500 Rural homes (RTAM))	No	National (Urban+Rural)	Yes	Yes	Yes, in Digital Ad Ratings (DAR) & Total Ad Ratings (TAR)	Yes (Streaming Content Ratings) 3000 individuals, subset for mobile from TV Panel. National Urban. Using Android base Smartphone, Age 13+	Yes	Yes	Yes	No	Arianna

Survey Notes: **Japan**, Video Research Ltd: Peoplemeters in Tokyo & Osaka. Non-continuous measurement, 2 week sweeps conducted every two months (12 weeks/year). Subscription TV panel is separate from national terrestrial TV panel of 5,100 homes, 52 weeks reporting/year

*1 : Tokyo 30km area *2 : main area, 5 Pref. *3 : main area of Chukyo, 3 Pref. *4 : main area of northern Kyushu *5 : Sapporo city

TELEVISION AUDIENCE MEASUREMENT 2024-2025

MARKETS	RESEARCH COMPANY	PEOPLEMETER PANEL SIZE (HOMES/HOUSEHOLDS)	RETURN PATH DATA (RPD) PANEL	PANEL COVERAGE	CABLE/ SATELLITE MEASURED	DTT MEASURED	INTERNET, TABLETS & SMARTPHONES	VOD &/OR OTT SERVICES MEASURED	COMMERCIAL BREAK RATINGS FOR PAY TV CHANNELS	COMMERCIAL SPOT LOGS FOR PAY TV CHANNELS	PAY TV REACH & FREQUENCY AVAILABLE	TIME SHIFT VIEWING MEASURED	SOFTWARE
PHILIPPINES METRO	Nielsen	Metro Panel 1,950 (1,150 Mega Manila homes (MEGATAM) and 800 homes for 6 other Metros (MCTAM))	No	Metro Cities	Yes	Yes	Yes, in Digital Ad Ratings (DAR) & Total Ad Ratings (TAR)	No	Yes	Yes	Yes	No	Arianna
PHILIPPINES	Kantar Media	National Panel: 1,900 homes	No	National (Urban + Rural)	Yes (Atria Pro)	Yes	No	No	Yes (selected channels)	Yes (selected channels)	Yes	No	Instar Analytics
SINGAPORE	GFK	1,200 households and 2,000 individuals on PC/tablets/mobile devices	No	National	Yes	Yes	Yes	No	No	No	Yes	Yes (up to 28 days)	Evogenius
	Nielsen for StarHub SmartAM	-	Panel: 5,000 homes Census: 128,000 homes	StarHub TV Subscriber base	Yes	No	No	Yes for VOD	Yes in eTAM	Yes in eTAM	Yes	Yes	Arianna/ eTAM
	Kantar Media	-	100% Singtel TV base	National	Yes	No	No	Yes	No	Yes	Yes	Yes	Instar Analytics
SOUTH KOREA	Nielsen	4,144	No	National	Yes	Yes	Yes	No	Yes	Yes	Yes	Partly yes (10 main channels, only for KBS)	Arianna
TAIWAN	Nielsen	2,000 HH, 6,500-6,600 Individuals	-	National	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arianna
TAIWAN (MOD)	Nielsen	-	17,000	MOD subscriber base	No	No	No	No	Yes	Yes	Yes	No	Arianna
THAILAND	Nielsen	2,400	No	National	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arianna, eTAM (Q4, 2022)
VIETNAM	Kantar Media	4,032 homes	n.a.	Nationwide 6 economic regions 4 cities	Yes	Yes	No	OTT - linear TV	Yes	Yes	Yes	n.a.	Instar Analytics

Survey Notes: **Australia**, OzTAM and Regional TAM: Peoplemeter/OzTAM: 5 City Metro Markets: Sydney, Melbourne, Brisbane, Adelaide & Perth & Nationally for Subscription Australia, TV/RegionalTAM: Queensland, Northern NSW, Southern NSW, Victoria, Tasmania and Regional Western Australia. Australia, User Choice* Gold Standard accredited software suppliers for OzTAM & Regional TAM Data : TV Map (Broadcast M.A.P), R8ting Library for MediaWise (Day 8 Technology), AdQuest eTAM (Landsberry & James), Pinery (MediaCom) OzTAM only, Arianna (Nielsen TAM), TARDIIS (Starcom MediaVest Group), AdvantEdge (TechEdge) **Indonesia**, Nielsen: Terrestrial & pay TV: 11 cities: Jakarta, Surabaya, Medan, Semarang, Bandung, Makassar, Yogyakarta, Palembang, Denpasar, Banjarmasin and Surakarta. **Japan**, Video Research Ltd. Peoplemeters in Tokyo & Osaka. Non-continuous measurement, 2 week sweeps conducted every two months (12 weeks/year). Subscription TV panel is separate from national terrestrial TV panel of 6,600 homes, 52 weeks reporting /year **Myanmar**, Myanmar Media Insight: Diary Panel, covering in 6 Key Cities within

Metro and Urban (Yangon, Mandalay, Nay Pyi Taw, Taunggyi, Magway, Mawlamyine) Pakistan, Medialogic: 20 cities - Karachi, Lahore, Islamabad, Rawalpindi, Faisalabad, Multan, Hyderabad, Sukkur, Gujranwala, Bahawalpur, Peshawar, Sheikhupura, Sialkot, Pakpattan, Jehlam, Kohat, Mardan, Larkana, Dadu and Quetta **Philippines** PHINTAM (National Urban and Rural), NUTAM (National Urban), Mega TAM (Metro Manila & suburbs), MCTAM (Metro cities) **South Korea**, Nielsen: National and over 200 pay TV channels are monitored programme names or TVC spot logs. (Seoul, Incheon, Busan, Gwangju, Daejeon, Daegu, Ulsan, Gyeong Province, Kangwon Province, North Chungcheong Province, South Chungcheong Province, North Gyeongsang Province, South Gyeongsang Province, North Jeolla Province, South Jeolla Province, Jeju Island) South Korea, TNMS: Return Path Data panel size is 10,000 homes of KT IPTV. **Vietnam**, Kantar Media, National and 4 city markets: Hanoi, HoChiMinh City, Danang and Cantho. Please contact the research company for a comprehensive report on measurement.

SYNDICATED MEDIA SURVEYS 2024-2025

MARKETS	RESEARCH COMPANY	SURVEY	SAMPLE SIZE	PANEL COVERAGE	METHODOLOGY	DEMOGRAPHICS	CAB/SAT MEASURED	DTT	SOFTWARE	REACH & FREQUENCY
AUSTRALIA	Nielsen	Consumer & Media View	30,000+	National	Online	14+	Yes	Yes	Clear Decisions	No
CHINA	Sinomonitor	CMMS/H3-TGI	CMMS - 120,000+ H3 - 14,000	CMMS - National, 108 cities (tier 1-5) H3 - National, 20 cities (tier 1-3) MMMS - National, 46 cities (tier 1-3)	Face-to-Face/Self completed/Online	CMMS - 15-64 H3 - 18-60	Yes	No	Telmar DataTile	No
INDIA	Kantar IMRB	TGI India	60,000+ (Urban + Rural population)	National	Face-to-Face/CAPI	15 - 55 ABCDE	Yes	No	Choices	Yes
INDONESIA 11 cities & National Urban (Exc Papua Maluku)	Nielsen	Consumer & Media View	17,000+ ; 30,000+	Indonesia, 11 cities & Indonesia National Urban Exclude Papua & Maluku	Face to Face Interview/Online	10+	Yes	Yes	Clear Decisions	Yes
JAPAN	Video Research Ltd	Japan TGI (ACR)	10,700	7 largest cities (Tokyo, Kansai, Nagoya, Fukuoka, Sapporo, Sendai, Hiroshima)	Area random sampling & online survey (Self completed on a dedicated survey tablet)	Male & Female 12-69 years old	Yes	Yes	VR-CIP, inhouse developed asp service	Yes
MALAYSIA East Malaysia	Nielsen	Consumer & Media View	3,600	East Malaysia [Sabah - Kota Kinabalu, Sandakan, Tawau & Sarawak - Kuching, Miri, Sibuj]	Face-to-face	15+	Yes	Yes	Clear Decisions	Yes
MALAYSIA Peninsular only	Nielsen	Consumer & Media View	10,000	Peninsular Malaysia Only	Face-to-face or CATI (Rural)/Online (Urban)	15+	Fused with TAM data	Fused with TAM data	Clear Decisions	Yes
MYANMAR	Nielsen Media Myanmar	Consumer & Media View	3,700	National	CAPI/ CATI	10 - 64	Yes	Yes	Clear Decisions	No
NEW ZEALAND	Nielsen	Consumer Media Insights	10,000	National	Online + recruitment via CATI & Social Media. All surveys completed Online	15+	Fused with TAM data	Fused with TAM data	Clear Decisions	Yes (Print only)
PHILIPPINES National Urban	Nielsen	Consumer & Media View	10,000	National Urban	CATI-CAWI/Face-to-Face CAPI	10+	Yes	Yes	Clear Decisions	Yes
SINGAPORE	Nielsen	Consumer & Media View	4,200+	National	Face-to-face/Online/ CATI	15+	Yes	Yes	Clear Decisions	Yes (Print only)
TAIWAN	Nielsen	Media Index	10,000	National	Face-to-Face/Online	12 - 65	Yes	Yes	Clear Decisions	Yes
THAILAND	Nielsen	Consumer & Media View	9,000+	National	Face-to-Face/Online	12+	Yes	Yes	Clear Decisions	No
VIETNAM	Kantar Media	National Media Habit Survey	6,405	Nation wide	Face-to-Face interviewing with structured questionnaire	15 - 54	Yes	Yes	Choices	Yes
		Vietnam TGI [Media Habit Survey] 4 cities	8,520	4 cities: Hanoi, Danang, HCMC and Can Tho	Face-to-Face interviewing with structured questionnaire	15 - 54	Yes	Yes	Choices	Yes

SYNDICATED MEDIA SURVEYS 2024-2025

MARKETS	RESEARCH COMPANY	SURVEY	SAMPLE SIZE	PANEL COVERAGE	METHODOLOGY	DEMOGRAPHICS	CAB/SAT MEASURED	DTT	SOFTWARE	REACH & FREQUENCY
13 ASIA MARKETS	Kantar Media	TGI Global Quick View	84,000	Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Thailand, Taiwan	Online	16-65 year old internet users	Yes	Yes	Choices Online	Yes
14 ASIA MARKETS	GWI	GWI Core research	361,414	Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Taiwan, Thailand, Vietnam	Online	16+ Internet Users	Yes		GWI PRO Platform	Yes

DIGITAL AUDIENCE MEASUREMENT 2024-2025

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	ONLINE VIDEO REPORTING	PLANNING TOOLS
AUSTRALIA	Nielsen	1,900 PC 3,000 smartphone 1000 tablet	PC + Smartphone + Tablet	Panel only Measurement for audiences. Engagement metrics fused with census collection from tags where applicable	Audience based metrics such as Reach, page views based metrics including pageviews per person, session based metrics including sessions per person and time based metrics including time per person	Age, Gender, Income, Education & Region	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	n.a.	Measurement of static content on apps and websites across multiple platforms
JAPAN	Nielsen	14,500 PC 6,300 smartphone	PC + Smartphone (Android & iOS)	Not claim based but actual log behaviour based tracking	Unique Audience (000) Active Reach (%) Total Sessions (000) Sessions Per Person Total Minutes (000) Time Per Person (hh:mm:ss) Total Page Views (000) Page Views Per Person	Age, Gender, Income, Marital Status, Education, Occupation	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Total audience number report is delivered as one of element in DCR	n.a.	Measurement of static content on tableau online
NEW ZEALAND	Nielsen	2,200 PC	PC Only	Panel only Measurement for audiences. Engagement metrics fused with census collection from tags where applicable	Audience based metrics such as Reach, page views based metrics including pageviews per person, session based metrics including sessions per person and time based metrics including time per person	Age, Gender, Region	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	n.a.	n.a.	Measurement of static content on desktop apps and websites
SOUTH KOREA	Nielsen	12,000 PC 8,000 Smartphone	PC + Smartphone (Android & iOS)	Panel only Measurement for audiences. Audio matching with TV Reference(only for N-Screen)	Reach, Install, Time spent, Pageview, Session TV program viewership via PC & mobile(only for N-Screen)	Age, Gender, Region, Occupation, Marriage, Income, Lifestyle, Education	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	Yes	Measurement of static content on apps and websites across multiple platforms

TOTAL AD RATINGS 2024-2025

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
INDONESIA from September 2021	Nielsen	Nielsen TAM Panel - ~19,000 individuals Single source survey sample feeding probabilistic de-duplication model of 4,200, increased to 16,500 in Q1 2022. Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - National Urban TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
PHILIPPINES from September 2021	Nielsen	Nielsen TAM Panel - ~14,200 individuals Single source survey sample feeding probabilistic de-duplication model of 6,000. Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - National TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
TAIWAN from September 2021	Nielsen	Nielsen TAM Panel - ~7,000 individuals Single source survey sample feeding probabilistic de-duplication model of 3,145 increased to 8,300 in Q1 2022. Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - National TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
THAILAND from September 2021	Nielsen	Nielsen TAM Panel - ~8,000 individuals Single source survey sample feeding probabilistic de-duplication model of 6,000 increased to 8,900 in Q1 2022. Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model.	TV - Nielsen TAM - National TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Nielsen TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %
JAPAN from April 2022	Nielsen	Nielsen Digital Ad Ratings -Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Probabilistic Identity Model. Video Research TAM Panel is a 3rd party partner of Nielsen in Japan for Cross-Platform measurement - ~22,000 individuals Single source survey sample feeding probabilistic de-duplication model of ~20,000.	TV - Video Research TAM - National TV coverage. Digital - Nielsen DAR - Desktop, Mobile (Smartphone and Tablet, Web and App)	Uses established media trading currencies in market for Television (Video Research TAM) and Digital Ad Ratings (DAR). De-duplication factors created using a scaled media consumption survey, calibrated back to the media currencies.	Unique Audience, Impressions, Frequency, GRP, On Target % TV Only Exposure, Digital Only, TV+Digital, Unduplicated Audience	Age & Gender	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target %

DIGITAL AD RATINGS 2024-2025

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
AUSTRALIA JAPAN	Nielsen	Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Identity Model	Desktop, Mobile (Smartphone and Tablet, Web and App) Including Youtube In-App	Panel, Survey, Census Collection from Tags, Facebook Attribution, Google ADH, Nielsen ID identity system for Open Web, SDK or Platform Integration	Unique Audience, Tracked Ads, Frequency, GRP, On Target %	Age & Gender	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target % Custom Media Analytics tools available to visualise DAR data
INDIA INDONESIA PHILIPPINES SINGAPORE TAIWAN THAILAND	Nielsen	Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube. Open Web properties measured using Nielsen ID Identity Model	Desktop, Mobile (Smartphone and Tablet, Web and App) Including Youtube In-App	Panel, Survey, Census Collection from Tags, Facebook Attribution, Google ADH, Nielsen ID identity system for Open Web, SDK or Platform Integration	Unique Audience, Tracked Ads, Frequency, GRP, On Target %	Age & Gender	Additional segments can be explored on an ad hoc, post campaign basis subject to sufficient campaign size and panel availability	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target % Custom Media Analytics tools available to visualise DAR data
SOUTH KOREA	Nielsen	Facebook universe (millions) with calibration panel for Facebook Properties. Google universe (millions) with calibration panel for Google Video properties & Youtube.	Desktop, Mobile (Smartphone and Tablet, Web and App) Including Youtube In-App	Panel, Survey, Census Collection from Tags, Facebook Attribution, Google ADH, SDK or Platform Integration	Unique Audience, Tracked Ads, Frequency, GRP, On Target %	Age & Gender	-	Yes	All industry standard video and display advertising	Measurement of digital campaign Impressions, Reach, Frequency, GRP and On Target % Custom Media Analytics tools available to visualise DAR data

DIGITAL CONTENT RATINGS 2023-2024

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
AUSTRALIA	Nielsen	Nielsen machine learning algorithms along with Nielsen Digital Panel	Desktop, Mobile (Smartphone & Tablet, Web & App)	Panel, Survey, Census Collection from Tags, SDK or Platform Integration & Machine Learning	Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Age & Gender	Additional segments can be explored on an ad hoc basis	Yes	Measurement of digital video and static content Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Measurement of video & static content, apps, audio, etc.
JAPAN	Nielsen	Nielsen machine learning algorithms along with Nielsen Digital Panel	Desktop, Mobile (Smartphone & Tablet, Web & App)	Panel, Survey, Census Collection from SDK and Platform Integration	Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Age & Gender	Additional segments can be explored on an ad hoc basis	Yes	Measurement of digital video and static content Reach, Time Spent, Page Views, App Launches, Platform, Content Type, Unique Audience, and Categories	Measurement of video & static content across web and apps
NEW ZEALAND	Nielsen	Volumetrics only (Separate panel based hybrid service in market)	Desktop, Mobile (Smartphone & Tablet, Web & App)	Census Collection from Tags & SDK	Time Spent, Page Views, App Launches, Platform, Content Type and Categories	n.a.	Additional segments can be explored on an ad hoc basis	Yes	Volumetric reporting for static and video content across platforms	Measurement of video and static content, apps, audio, etc.
THAILAND	Nielsen	Volumetrics only	Desktop, Mobile (Smartphone & Tablet, Web & App)	Census Collection from SDK	Time Spent, Page Views, App Launches, Platform, Content Type and Categories	n.a.	Additional segments can be explored on an ad hoc basis	Yes	Volumetric reporting for static and video content across platforms	Measurement of video and static content, apps, audio, etc.

DIGITAL AUDIENCE MEASUREMENT 2024-2025

MARKETS	RESEARCH COMPANY	SIZE OF PANEL	PLATFORM COVERAGE	METHODOLOGY	CORE REPORTING METRICS	DEMOGRAPHICS	AUDIENCE SEGMENTATION (BEHAVIOUR)	MULTI-PLATFORM REPORTING	REPORTING	PLANNING TOOLS
AUSTRALIA HONG KONG JAPAN SINGAPORE TAIWAN VIETNAM	Comscore	2 million-person global human panel and extensive Comscore census network	Desktop, Mobile (Smartphone and Tablet, Web and App)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender, Expanded Demographics* (depending on market and product)	Yes	Yes	Unique Video Viewers, VideoStreams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency
INDIA	Comscore		Desktop, Mobile (Smartphone and Tablet, Web and App) CTV (Device Level)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender, Expanded Demographics* (depending on market and product), State Level Clusters	Yes	Yes	Unique Video Viewers, Video Streams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency, Mobile and Multi-Platform Reach/Frequency, Plan Metrix Multi-Platform
INDONESIA MALAYSIA	Comscore		Desktop, Mobile (Smartphone and Tablet, Web and App) CTV (Device Level)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender, Expanded Demographics* (depending on market and product)	Yes	Yes	Unique Video Viewers, Video Streams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency
NEW ZEALAND	Comscore		Desktop, Mobile (Smartphone and Tablet, Web and App)	People Panel, Enumeration Survey, Server Tags, SDK	Unique Visitors, Minutes, Page Views, Visits	Age, Gender	Yes	No	Unique Video Viewers, Video Streams, Viewing Duration, Total Minutes	Campaign Reach/Frequency, Video Reach/Frequency



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